

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:
Bid Receiving - PWGSC / Réception des
soumissions - TPSGC
11 Laurier St. / 11, rue Laurier
Place du Portage, Phase III
Core 0A1 / Noyau 0A1
Gatineau
Québec
K1A 0S5
Bid Fax: (819) 997-9776

REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION

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

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

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

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

Comments - Commentaires

Title - Sujet Media Monitoring	
Solicitation No. - N° de l'invitation 08324-130491/A	Date 2014-03-24
Client Reference No. - N° de référence du client 08324-13-0491	
GETS Reference No. - N° de référence de SEAG PW-\$\$CY-007-64913	
File No. - N° de dossier cy007.08324-130491	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2014-04-17	Time Zone Fuseau horaire Eastern Daylight Saving Time EDT
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Westall, Susan	Buyer Id - Id de l'acheteur cy007
Telephone No. - N° de téléphone (613) 949-8350 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: DEPARTMENT OF FOREIGN AFFAIRS AND INTERNATIONAL TRADE LB PEARSON BLDG TWR D2 125 SUSSEX DR. OTTAWA Ontario K1A0G2 Canada	

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address

**Raison sociale et adresse du
fournisseur/de l'entrepreneur**

Issuing Office - Bureau de distribution

Communication Procurement Directorate/Direction de
l'approvisionnement en communication
360 Albert St./ 360, rue Albert
12th Floor / 12ième étage
Ottawa
Ontario
K1A 0S5

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

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PART 1 - GENERAL INFORMATION

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, and the basis of selection;
- Part 5 Certifications: includes the certifications to be provided;
- Part 6 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work and the Basis of Payment.

2. Summary

- (i) The Department of Foreign Affairs, Trade and Development (DFATD) requires the services of a company to provide daily information and market intelligence briefings on Foreign Direct Investment (FDI) and Innovation to support its promotional activities. The objective is to increase awareness of Canada's investment value propositions and innovation capabilities across key sectors and position Canada as a premium business destination among the international business community
- (ii) The resulting contract will be in effect from May 1, 2014 to April 30, 2015 with four (4) irrevocable option periods of one year each.
- (iii) The requirement is subject to the provisions of the Agreement on Internal Trade (AIT).
- (iv) The requirement is subject to a preference for Canadian goods and/or services.

3. 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 in writing, by telephone or in person.

PART 2 - BIDDER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

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.

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.

The 2003 (2014-03-01) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

1.1 SACC Manual Clauses

A3015T (2008-12-12) Certifications

A7035T (2007-05-25) List of Proposed Subcontractors

2. Submission of Bids

Bids must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated on page 1 of the bid solicitation.

Due to the nature of the bid solicitation, bids transmitted by facsimile to PWGSC will not be accepted.

3. Former Public Servant

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.

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.

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.

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.

4. Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than ten (10) calendar days before the bid closing date. Enquiries received after that time may not be answered.

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.

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Buyer ID - Id de l'acheteur

cy007

CCC No./N° CCC - FMS No/ N° VME

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5. Applicable Laws

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

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the bidders.

PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

Canada requests that bidders provide their bid in separately bound sections as follows:

Section I: Technical Bid (4 hard copies)

Section II: Financial Bid (1 hard copy)

Section III: Certifications (1 hard copy)

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

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

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use a numbering system that corresponds to the bid solicitation.

Section I: Technical Bid

In their technical bid, bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.

The technical bid should 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.

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Basis of Payment in Annex "B". The total amount of Applicable Taxes must be shown separately. All prices must be submitted in Canadian currency.

Section III: Certifications

Bidders must submit the certifications required under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.
- (c) The evaluation team will determine first if there are three (3) or more bids with a valid Canadian Content certification. In that event, the evaluation process will be limited to the bids with the certification; otherwise, all bids will be evaluated. If some of the bids with a valid certification are declared non-responsive, or are withdrawn, and less than three responsive bids with a valid certification remain, the evaluation will continue among those bids with a valid certification. If all bids with a valid certification are subsequently declared non-responsive, or are withdrawn, then all the other bids received will be evaluated.

The evaluation will be done in four (4) stages as follows:

Stage 1 - Technical Bid Review against Mandatory Requirements (see 1.1.1 below)

To be considered responsive, a proposal must meet all the mandatory requirements of this Request For Proposal. Proposals not meeting all of the mandatory requirements will be given no further consideration and will be declared non-responsive. Proposals meeting the Mandatory requirements will go on to be evaluated for Point-Rated Requirements.

Stage 2 - Technical Bid Review against Point-Rated Requirements (see Article 1.1.2 below)

Only proposals that meet all of the Mandatory requirements will be considered in the evaluation of the Rated Requirements. To be considered responsive, a proposal must obtain a minimum of 70% overall.

Stage 3 - Financial Bid Evaluation (see Article 1.2 below)

If the proposal is considered responsive, the Contracting Authority will calculate the value of the financial proposal by multiplying the yearly estimated quantities provided in 1.2.1 by each pricing element for the contract period and each of the five optional periods. The total for each will be added to obtain the total aggregate price (TAP).

Stage 4 - Calculation of combined rating of technical merit and price

The points awarded to the technical proposal in Stage 2 (above) are weighted at 70% of the total score and the TAP as calculated in Stage 3 (above) is weighted at 30% of the total score. The combined scores determine the Bidders overall point rating for technical merit and cost.

The lowest priced technically compliant proposal will be allocated the maximum points of 30 and other price proposals will be prorated accordingly.

Technical scores will be prorated against the total possible score.

The total score will be determined by adding the technical points and the price points.

Following is an example. Information cited in the following example is for illustration purposes only.

Example of calculation for highest combined rating technical merit (70%) and price (30%)			
Bidder	Bidder 1	Bidder 2	Bidder 3
Technical Points	95	85	75
Price Quoted	90,000	75,000	70,000

Calculation	Technical Points	Price Points	Total Points
Bidder 1	95 x 70 = 71.93 ***100	*70 x 30 = 23.33 **90	95.26
Bidder 2	85 x 70 = 59.5 100	70 x 30 = 28 75	87.5
Bidder 3	75 x 70 = 55.93 100	70 x 30 = 30 70	85.93

* Represents the lowest priced proposal (TAP)

** Represents the bidders price proposal (TAP)

*** Represents the total amount of points available

1.1.1 Mandatory Technical Criteria

Bidders **must meet all** the mandatory requirements. Proposals not meeting all of the mandatory requirements will be given no further consideration and will be declared non-responsive. Proposals meeting all of the mandatory requirements will go on to be evaluated for the Point-Rated Requirements.

#	Mandatory Criteria	Met/Not Met
M 1	<p>Bidders must have a minimum of one year experience within the last 3 years of the closing date of this RFP, providing services similar* to those identified in the Statement of Work.</p> <p>To demonstrate their experience, bidders must provide details of one (1) previous project with duration of at least one year within the last 3 years. The following must be cited for the project identified:</p> <ul style="list-style-type: none"> · Name of Client · Project start date · Project end date · Description of the services provided · Similarity to this requirement <p>*Similar is defined as alike but not identical, showing resemblance in their contents, their qualities, their characteristics or their appearance. Similar services submitted must demonstrate the Bidder's experience in monitoring media sources for the purpose of gathering and reporting market intelligence data.</p>	
M 2	Bidders must provide a contact for each project cited in their proposal that can attest to the services provided. Contact information must include contact name, title, phone number and/or e-mail address.	
M 3	Bidders must provide 3 professional written references that confirm the Bidders ability to provide timely and quality work.	

M 4	Bidders must <u>demonstrate</u> in their proposal, the ability to deliver the service described in the statement of work in both official languages (English and French).	
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1.1.2 Point Rated Technical Criteria

#	Point Rated Criteria	Points Allocation	Max Points
R1 Experience in market intelligence	Bidders should describe their years of experience in gathering and distributing competitive market intelligence to large organizations or audiences, by describing their project experience. For each project described, bidders must include the name of the organization, the size of the audience to which the information was distributed, and contact information with the contact name, title, phone number and/or e-mail address.	2 points for every year of experience up to a maximum of 10 points	10
R2 Experience in International Trade	Bidders should provide a brief description of their experience collecting market intelligence on key components of international trade such as exports, foreign direct investment and science, technology, and innovation.	2 point for each example up to a maximum of 10 points	10
R3 Experience in innovative solutions	Bidders should provide examples of their innovative solutions for sharing/distributing market intelligence or similar work using new technologies (show samples)	2 points for every solution up to a maximum of 10 points	10
R4 Proposed solution	<p>Bidders should describe their proposed solution to meet all the requirements in the statement of work. Bidders should describe the methodology, procedures, timetable and level of effort, and technological tools required to undertake and deliver all aspects of the project as detailed in the Statement of Work. Bidders should explain:</p> <ul style="list-style-type: none"> ▪ How all the important news sources on FDI and innovation would be monitored and collected. ▪ How this information would be filtered, aggregated and summarized in a timely (daily) and meaningful way ▪ How the resulting competitive market intelligence would be shared with the Department's network abroad and in Canada ▪ What would be the functionalities (e.g. login, user access, customization features, reports, etc.) of the technology solution or tools proposed to share this intelligence? ▪ How the positive investment news would be published on the Invest in Canada website through public feeds and shared through social media channels 	See evaluation grid below	70

Total	Minimum pass: 70 points or 70%		/100
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Evaluation Grid for R4 – Proposed Solution (max 70 points)

	Weighting *	Criteria not met (0 points)	Criteria partially met (1 point)	Criteria met (2 points)
A) Overall methodology and procedures (maximum 10 points)	5	Not provided or unclear. Does not demonstrate an understanding of the requirement	Lacks details. Does not fully demonstrate an understanding of the requirements. Some activities are identified but there are gaps in procedures. Some clarification required.	Detailed and clear methodology. Excellent identification of activities. Demonstrates a full understanding of the requirement. No clarification required.
SCORE: 10 x _____ = _____				

	Weighting *	Criteria not met (0 points)	Criteria partially met (1 point)	Criteria met (2 points)
B) Timetable and level of Effort (maximum 10 points)	5	Timing and/or associated level of effort by proposed resources not defined or unclear.	Includes timetable and level of effort. Elements are identified but lack details. Logic is unclear. Some clarification required.	Timing and associated level of effort is detailed, clear and logical. No clarification required.
SCORE: 5 x _____ = _____				

	Weighting *	Criteria not met (0 points)	Criteria partially met (1 point)	Criteria met (2 points)
C) Monitoring and collection of FDI and innovation data (maximum 10 points)	5	Does not demonstrate capability. Limited details. Processes are unclear. Does not demonstrate an	Demonstrates some capability. Lacking in some details. Does not fully demonstrate an understanding of the requirements.	Clearly demonstrates capability and experience. Provides detailed information on processes. Demonstrates a full

		understanding of the requirement.	Some clarification required.	understanding of the requirement. No clarification required.
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SCORE: 5 x _____ = _____

	Weighting *	Criteria not met (0 points)	Criteria partially met (1 point)	Criteria met (2 points)
D) Filtering, aggregation and summarization of information (maximum 10 points)	5	Does not demonstrate capability. Limited details. Processes are unclear. Does not demonstrate an understanding of the requirement.	Demonstrates some capability. Lacking in some details. Does not fully demonstrate an understanding of the requirements. Some clarification required.	Clearly demonstrates capability and experience. Provides detailed information on processes. Demonstrates a full understanding of the requirement. No clarification required

SCORE: 5 x _____ = _____

	Weighting *	Criteria not met (0 points)	Criteria partially met (1 point)	Criteria met (2 points)
E) Distribution / sharing of information (maximum 10 points)	5	Does not demonstrate capability. Limited details. Processes are unclear. Does not demonstrate an understanding of the requirement.	Demonstrates some capability. Lacking in some details. Does not fully demonstrate an understanding of the requirements. Some clarification required.	Clearly demonstrates capability and experience. Provides detailed information on processes. Demonstrates a full understanding of the requirement. No clarification required

SCORE: 5 x _____ = _____

	Weighting *	Criteria not met (0 points)	Criteria partially met (1 point)	Criteria met (2 points)
F) Technology solution for	5	Solution is unclear and/or not logical.	Solution addresses most	Solution is clear and logical and

sharing information (maximum 10 points)		Does not address the requirements in the statement of work. Does not demonstrate the technical capability and expertise to meet the requirements in the statement of work. Limited details. Processes are unclear. Does not demonstrate an understanding of the requirement.	requirements in the statement of work. Demonstrates the technical capability and expertise to meet most of the requirements in the statement of work. Information on processes lacks detail and/or elements missing. Does not fully demonstrate an understanding of the requirement. Some clarification required	addresses all requirements in the statement of work. Demonstrates the technical capability and expertise to meet all requirements in the statement of work. Provides detailed information on processes. Demonstrates a full understanding of the requirement. No clarification required
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SCORE: 5 x _____ = _____

	Weighting *	Criteria not met (0 points)	Criteria partially met (1 point)	Criteria met (2 points)
G) Publishing of information (maximum 10 points)	5	Solution is unclear and/or not logical. Does not demonstrate the technical capability and expertise to meet the requirements in the statement of work. Limited details. Processes are unclear. Does not demonstrate an understanding of the requirement.	Solution demonstrates the technical capability and expertise to meet most of the requirements in the statement of work. Information on processes lacks detail and/or elements missing. Does not fully demonstrate an understanding of the requirement. Some clarification required	Solution is clear and logical and addresses all requirements in the statement of work. Demonstrates the technical capability and expertise to meet all requirements in the statement of work. Provides detailed information on processes. Demonstrates a full understanding of the requirement. No clarification required

SCORE: 5 x _____ = _____

TOTAL SCORE FOR R4: _____ (Max 70 points)

***Weighting:** To determine the bidder's points, the points obtained for each criteria listed will be multiplied by the weighting factor. For example, where a weighting factor for a criterion is 5 and the bidder's score is 2 points, the total points for that criterion will be 10.

1.2 Financial Evaluation

For evaluation purposes only, the following yearly estimated quantities will be used by the Contracting Authority to calculate the TOTAL AGGREGATE PRICE (TAP). The TAP will be evaluated on the total requirement, including option years, using the firm all-inclusive rates proposed by the Bidder in Annex "B".

Requirement	Unit	Estimated annual volume
One time setup fee	Setup	1 setup
Monthly Fee to include all services outlined in the statement of work	Month	12 months

2. Basis of Selection

1. To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation;
- (b) meet all mandatory technical evaluation criteria; and
- (c) obtain the required minimum points for the technical evaluation criteria which are subject to point rating.

2. Bids not meeting (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid that receives the highest number of points nor the one that proposed the lowest price will necessarily be accepted. The responsive bid with the highest overall score for combined rating of technical merit and price 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 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.

1. Mandatory Certifications Required Precedent to Contract Award

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.

1.2 Canadian Content Certification

The Bidder certifies that:

() the services offered are Canadian services as defined in paragraph 4 of clause A3050T.

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.

2.1 Status and Availability of Resources

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting

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Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability.

Signature: _____ Date: _____

2.2 Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

Signature: _____ Date: _____

PART 6 - RESULTING CONTRACT CLAUSES

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

1. Statement of Work

1.1 The contractor will fulfill the requirement in accordance with the Statement of Work at Annex A.

2. 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* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

2.1 General Conditions

2035 (2014-03-01) General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

2.2 Ownership of Intellectual Property

SACC Manual Clause K3200T (2008-12-12) Basis for Canada's Ownership of Intellectual Property

The Department of Foreign Affairs, Trade and Development has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following grounds: the main purpose of the contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.

3. Security Requirement

There is no security requirement applicable to this Contract.

4. Term of Contract

4.1 Period of the Contract

The period of the contract is from May 1, 2014 to April 31, 2015, inclusive.

4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to four (4) additional one (1) year period under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor 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.

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5. Authorities

5.1 Contracting Authority

The Contracting Authority for the Contract is:

Susan Westall (or the authorized representative)
Public Works and Government Services Canada
Communication Procurement Directorate
360 Albert Street, 12th Floor
Ottawa , Ontario K1A 0S5

Tel: 613-949-8350

Fax: 613-993-2581

E-mail susan.westall@pwgsc-tpsgc.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.

5.2 Project Authority

The Project Authority for the Contract is (to be inserted at contract award).

The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Project Authority; however, the Project 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.

5.3 Contractor's Representative:

Name: _____

Title: _____

Telephone: ____ - ____ - _____

Facsimile: ____ - ____ - _____

E-mail: _____

6. Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price, as specified in Annex B- Basis of Payment for a cost of \$ _____ (to be inserted at contract award). Customs duties are included, and applicable Taxes are extra.

6.1 Basis of Payment - Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ _____ (to be inserted at contract award). Customs duties are included and Applicable Taxes are extra.

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:

- A. when it is 75 percent committed, or
- B. four (4) months before the contract expiry date, or
- C. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,

whichever comes first.

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. Provision of such information by the Contractor does not increase Canada's liability.

6.2 SACC Manual Clauses

C0705C (2010-01-11) Discretionary Audit

H1008C (2008-05-12) Monthly Payment

C6000C (2011-05-16) Limitation of Price

7. Invoicing Instructions

1. The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

Invoices must be distributed as follows:

A. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

B. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

8. Certifications

Compliance with the certifications and related documentation provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the term of the Contract. If the Contractor does not comply with any certification, provide the related documentation or if it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

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9. Applicable Laws

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

10. Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the general conditions 2035 (2014-03-01) General Conditions - Higher Complexity - Services;
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment;
- (e) The offeror's offer dated _____.

11. Additional SACC Manual Clauses

A0072C (2008-12-12) Termination on Thirty Days Notice

C0705C (2010-01-11) Discretionary Audit

D5328C (2007-11-30) Inspection and Acceptance

ANNEX A

STATEMENT OF WORK

OBJECTIVE

The Department of Foreign Affairs, Trade and Development (DFATD) requires the services of a company to provide daily information and market intelligence briefings on Foreign Direct Investment (FDI) and Innovation to support its promotional activities. The objective is to increase awareness of Canada's investment value propositions and innovation capabilities across key sectors and position Canada as a premium business destination among the international business community. The focus of the work should be: 75% on FDI and 25% on Innovation.

BACKGROUND

The Department of Foreign Affairs, Trade and Development (DFATD) is the department responsible for fostering the expansion of Canada's commercial relations internationally. This includes the responsibility to promote, attract and retain foreign direct investment (FDI) in Canada in order to increase productivity and generate higher living standards for all Canadians. To that end, the Department assists international companies planning to invest in Canada or to expand their operations in Canada by guiding them through every step of the investment process, from the exploratory phase through to site selection and follow-up. It offers foreign investors a wealth of information about doing business in Canada and one-on-one customized assistance through its network of trade and investment professionals operating in over 150 cities worldwide.

With nearly 190 national agencies engaged in attracting FDI projects, the competition for FDI has intensified significantly over the last decade. Due to the complex and dynamic nature of FDI and the rapid pace of change affecting location decisions on regional, national and global levels, the extensive use of market intelligence is an essential prerequisite for the day-to-day operations and strategic planning of a successful FDI promotion program. In light of this, the Department has been subscribing to a tailored market intelligence service over the last several years to monitor FDI trends, identify Canada's strengths and weaknesses vis-à-vis major competitors and report on new FDI projects and expansions in Canada. This service is used extensively by DFATD and its network of Canadian missions abroad and by a number of FDI partners in Canada as a source of daily intelligence to support their investor prospecting activities. It is also used as a source of positive news feeds featured on the Invest in Canada website. As such, it is part of an integrated investor outreach communication plan that includes publications, promotional events, signage, videos, the use of social media, and the InvestinCanada.com website.

Recognizing that innovation is a driver of future competitiveness and a key element of Canada's value proposition, DFATD also seeks to ensure economic prosperity through investments in science, technology (S&T) and innovation, as well as facilitate the commercialization of new products and services in international markets. As such, this tailored market intelligence service has been recently extended to provide daily information and market intelligence briefings on Innovation.

REQUIREMENT

In order to continue to support its FDI and Innovation activities, DFATD requires the services of a market and competitive intelligence firm to monitor, review and analyze key media sources. This service's aim is to provide current, relevant and timely information to the Department's network abroad and in Canada. As a key source of FDI intelligence for DFATD, it will be used to report on FDI projects in Canada, support investor prospecting activities, position Canada as a top business location in the minds of

international investors and inform policy advocacy efforts to strengthen Canada's investment climate. As a key source of Innovation intelligence for DFATD, this service will be used to highlight Canada's scientific capabilities, with an emphasis on highlighting Canadian success stories and bilateral S&T cooperation between Canadian stakeholders and priority international partners. The Department is looking for a creative and innovative approach using leading-edge technology to share this intelligence.

SCOPE OF WORK

Tasks

- Monitor all important news sources on FDI and innovation from both traditional channels and emerging technologies such as news websites, newswires, newsfeeds, company websites, social media posts and discussions, as well as provincial, territorial and city websites and social media posts.
- Curate all market intelligence related to FDI in Canada: e.g., new FDI projects and expansions, potential FDI targets and leads, rankings in international benchmarking studies, sector strengths, investment advantages, support programs, provinces and Canadian cities location advantages, policy changes affecting the investment environment, promotion events and activities, opportunities, etc.
- Curate all market intelligence related to innovation: e.g., Canada as a world leader in innovation, Canadian companies excelling in R&D and commercialization, economic factors affecting innovation, policy changes in Canada's innovation strategies, trade commissioners profiled in the media in efforts related to innovation, comparisons of Canada against other nations in innovation, etc.
- Share resulting market intelligence with Trade Commissioners and partners on a daily basis through internal feeds offering customization, summary and analysis functionalities.
- Timely report (same day) on new FDI projects and expansions across Canada and potential FDI targets and leads.
- Publish positive investment news on website through public feeds and share on social media channels.

Key Themes

This service will be focused on:

- Showcasing Canada's advantages as an investment location: high quality of life, creativity and openness to the world;
- Marketing Canada as a welcoming business partner with a first-class business environment and a world leader in innovation;
- Highlighting the strengths and international competitiveness of Canada's industries, with a focus on priority sectors for FDI attraction and Canadian capabilities in research and development;
- Reporting on recent FDI projects across Canada, success stories and new and emerging Canadian innovation breakthroughs with examples of Canadian innovators succeeding in international markets;
- Comparing Canada's FDI performance against competitors and identifying real or perceived investment impediments;
- Identifying the role of the Trade Commissioner Service in helping Canadian firms commercialize technology through access to international partners and markets;

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- Promoting new innovation programs and/or funding opportunities relating to accessing foreign markets or international partners;
 - Providing management and investment officers across DFATD with the intelligence needed to effectively promote FDI;
 - Stimulating demand in the target audience for more information and further dialogue;

Key Parameters

Sectors and Sub-Sectors of focus

Aerospace
Automotive
Bio-products
Biopharmaceuticals
Business Services
Digital Media
Financial Services
Functional Foods
Machinery and Equipment
Medical Devices
Mining
Oil & Gas
Plastics and Chemicals
Renewable Energy
Software
Wireless Communications
Regenerative medicine
Neuroscience
Aging
Biomedical engineering
New media
Broadband networks
Telecom equipment
Water, carbon capture and storage
Advanced Manufacturing
Arctic & Ocean Technologies

Strategic Focus

This intelligence should be specific but not be limited to: FDI projects that directly contribute to the production of high-value added goods and services in Canada, the promotion of skilled employment and high wages, the introduction or development of new products and process technologies, the provision of international market access and the globalization of Canadian industries.

Tracking of the Canadian market will focus on Canadian R&D activity such as exciting new R&D investments, skilled labour, top notch R&D innovations, key university programs, overall publicity for clusters, programs and partners of Invest in Canada, and information highlighting Canada's performance on a global scale in the relevant sectors. There will be a special focus on the commercialization aspect of STI.

Languages

English media sources are to be used to populate the English feed and French media sources will be used to populate the French feed. It is expected the same level of effort will be given to the French feed as the English feed.

CONSTRAINTS

Limitations of Conclusions

It is anticipated that the information would be based on secondary sources and that no primary research would be required. However, it is expected that the supplier reviews selected content to ensure that it meets the needs of the project authority. Also, it is expected that the project authority will request on an as-needed basis to have content included. The secondary data provided as intelligence will be limited to that which is in the public domain. The contractor should be cognizant of limitations in extrapolating information gathered from sources that are in the public domain.

Exclusions

The following are to be excluded: news on international announcements on mergers and acquisitions, Foreign Portfolio Investments, Real Estate, Establishment of a sales or retail office, or holding companies for tax reasons.

Changes

The Project Authority may require customization of the above services in response to end user requirements. If minor customizing is required there shall be no additional cost to DFATD. Where there is a request by the Project Authority for customization that is not minor in nature, the Contractor must provide details of the alterations and associated costs to the Project Authority for review and approval. The Contractor cannot undertake any alteration without the written authorization of the Contracting Authority and will be evidenced through a contract amendment.

DELIVERABLES

The contractor must deliver all services as outlined in the SCOPE OF WORK. In addition the following deliverable is required:

Project Plan

The contractor shall provide, within one week of the project kick-off meeting, a work plan with all key dates identified. The milestones referred to in section Time Schedule should be articulated in the work plan with reference to specific dates. Any obligations, previous commitments or other conditions that are known to the contractor that will impact on the availability of the resources identified in the proposal, or impede the delivery of the project in any way, must be disclosed and factored into the project plan submitted for approval. Any assumptions being made by the contractor in arriving at the dates identified in the plan shall be clearly stated. The work plan must be approved by the Project Authority.

Standards

All work conducted by the contractor will be performed in compliance with Treasury Board Policy and Information Technology standards for the Government of Canada including the Web Content Accessibility Guidelines.

TIME SCHEDULE

Upon the contract being awarded, a kick off meeting with Project Authority will be held to familiarize the contractor with the project. From this point, the project is expected to progress in a sequence marked by the following milestones:

1. Design and approval of a detailed work plan
2. Development of an approved media monitoring scheme
3. Design and approval of the internal market intelligence feed
4. Design and approval of the public feeds
5. Design and approval of the functionality to develop reports and statistics
6. Ongoing provision of market intelligence services on FDI and Innovation (expected to start two weeks after contract being awarded).

PERSONNEL

The contractor must have dedicated personnel to monitor, curate and report on all important news sources on FDI and innovation in Canada on a daily basis. In the event that the Contractor's person(s) assigned to do so are unavailable, backup personal must be identified immediately for daily reporting to ensure there is no disruption of service.

Supplier's Responsibilities

The Supplier's responsibilities are to:

- 1) Be familiar with Invest in Canada's mandate, policies and guidelines relating to the Project.
- 2) Advise the Client in a timely manner of any delays or setbacks that may affect the Work schedule.
- 3) Respond to queries and concerns from the Client in a timely and respectful manner.
- 4) Provide the Client with an updated project schedule upon request.
- 5) Provide all facilities, technical expertise and materials required to deliver this Contract the Work.
- 6) Provide, as necessary or upon request, professional and technical advice and support to the Client, the Client's Project Team or the Client's stakeholders.
- 7) Ensure that all materials loaned to the Supplier by the Client are securely stored on its premises under suitable environmental conditions, and are returned to the Client properly identified and packaged upon completion of the Work.

Client's Responsibilities

The Client's responsibilities are to:

- 1) Work closely with the Supplier's Project Team in an effective and collegial manner, to maintain a productive working relationship.
- 2) Advise the Supplier in a timely manner of any delays or setbacks that may affect the Work schedule.
- 3) Respond to queries and concerns from the Supplier in a timely and respectful manner.

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- 4) Make every effort to provide the Supplier with required information in a timely manner.
 - 5) Provide limited access to, and use of, DFAIT's still and live-action, stock and original footage with the appropriate usage rights, if required.

APPROVAL AND ACCEPTANCE

The project plan and project completion will be considered approved upon issuance of written notification by the Project Authority.

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ANNEX B

BASIS OF PAYMENT

The bidder is required to submit firm, **ALL INCLUSIVE** unit rates in Canadian currency, as detailed below, **GST/HST extra if applicable**. All prices are to include travel, living and direct expenses incurred in the performance of the work such as copyright fees, long distance calls, and any other cost reimbursable items.

It is the responsibility of the Contractor to obtain and maintain at its own cost all permits, licenses, regulatory approvals and certificates required to perform the Work. Canada will not provide payment to any third party for such permits, licenses or approvals.

1. For the contract period from May 1, 2014 to April 30, 2015:

Requirement	Unit	Price
One time setup fee	Setup	\$ _____
Monthly Fee to include all services outlined in the statement of work	Month	\$ _____ / month

2. For the first option period from May 1, 2015 to April 30, 2016:

Requirement	Unit	Price
Monthly Fee to include all services outlined in the statement of work	Month	\$ _____ / month

3. For the second option period from May 1, 2016 to April 30, 2017:

Requirement	Unit	Price
Monthly Fee to include all services outlined in the statement of work	Month	\$ _____ / month

4. For the third option period from:

Requirement	Unit	Price
Monthly Fee to include all services outlined in the statement of work	Month	\$ _____ / month

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5. For the fourth option period from May 1, 2018 to April 30, 2019:

Requirement	Unit	Price
Monthly Fee to include all services outlined in the statement of work	Month	\$ _____ / month