

**WORKPLACE COMMUNICATION SERVICES  
INVITATION TO QUALIFY (WCS-ITQ)**

**AMENDMENT NO. 5**

This ITQ amendment No. 5 is raised to;

- 1- Amend article 4.5 'ITQ Reference Project Forms- Annex C (Mandatory at ITQ closing)';
- 2- Amend Annex C 'ITQ Reference Project Forms'; and
- 3- Publish Canada's responses to outstanding industry questions received during the question period.

**1. At article 4.5 'ITQ Reference Project Forms- Annex C (Mandatory at ITQ closing)' of the ITQ, REVISE as follows;**

**DELETE:** sub-article 4.5.6, in its entirety

**INSERT:** the following in its place:

**4.5.6** Canada will only consider the experience of the Respondent itself (not including any affiliate of the Respondent), subject to the following:

- a) The experience of a corporate predecessor will be evaluated as experience of the Respondent if:
  - i) The corporate predecessor amalgamated with another corporation to form the Respondent; or
  - ii) All or substantially all the assets of the corporate predecessor were acquired by the Respondent, the majority of the corporate predecessor employees became employees of the Respondent, and both the corporate predecessor and the Respondent carry on essentially the same business; or
  - iii) All or substantially all of a specific business unit that was responsible within the corporate predecessor for the work connected with the experience requirement has been transferred to the Respondent, along with all or substantially all the employees of that business unit, and the Respondent continues to carry on essentially the same business as that business unit.
- b) For Mandatory Experience Requirement C.1, C.4 and C.5, the Respondent may have acquired its experience working in the capacity of a subcontractor to a third party, as long as it was the Respondent that did the work associated with the experience requirement. In relying on this type of experience, the Respondent must provide the name of the prime contractor and a contact person with the prime contractor who can confirm the work performed by the Respondent as its subcontractor.

For example, Respondent A did IP Telephony work on behalf of Prime Contractor X for customer Y. Its work as a subcontractor to the Prime Contractor included all the mandatory experience elements required by Mandatory Experience Requirement C.1.

- c) For Mandatory Experience Requirements C.2 and C.3, the Respondent may have acquired its experience working in the capacity of a subcontractor to a third party, as long as it was the Respondent that did the work associated with the experience requirement. In relying on this type of experience, the Respondent is to provide the name of the prime contractor and a contact person with the prime contractor who can confirm the work performed by the Respondent as its subcontractor.

For example, Respondent A did Instant Messaging and Presence work on behalf of Prime Contractor X for customer Y. Its work as a subcontractor to the Prime Contractor included all the mandatory experience elements required by Mandatory Experience Requirement C.2.

- d) For Mandatory Experience Requirement C.4, the Respondent may have acquired its experience from an international location but must have Canadian Presence as specified in the ITQ Definitions.

**2. At Annex C 'ITQ Reference Project Forms', REVISE as follows;**

**DELETE:** the previous version of Annex C in its entirety.

**INSERT:** the new version of Annex C attached hereto this ITQ amendment.

**3. Responses to Industry questions received during the question period.**

Question	Answer
<p><b>#6-</b> To open up competition, we are requesting that the requirement for</p> <p style="padding-left: 40px;">Section 4.5.6 b) For Mandatory Experience Requirement C.1, C.4 and C.5, all Respondents must use Project References of their own.</p> <p>be updated to align with Section 4.5.6 c) which allows the work a Respondent in the capacity of a subcontractor to a third party, as long as it was the Respondent that did the work associated with the experience requirement. This change would still allow Canada to maintain a highly competitive process, but would allow experience gained by the Respondent doing IP Telephony work as a subcontractor, as a subset of a larger contract to receive the appropriate acceptance of that reference. Therefore we are requesting that Section 4.5.6 b) be updated as follows:</p> <p style="padding-left: 40px;">4.5.6 b) For Mandatory Experience Requirement C.1, C.4 and C.5, the Respondent may have acquired its experience working in the capacity of a subcontractor to a third party, as long as it was the Respondent that did the work associated with the experience requirement. In relying on this type of experience, the Respondent must provide the name of the prime contractor and a contact person with the prime contractor who can confirm the work performed by the</p>	<p>Please refer to the changes made to the ITQ in this amendment.</p>

<p>Respondent as its subcontractor.</p> <p>For example, Respondent A did IP Telephony work on behalf of Prime Contractor X for customer Y. Its work as a subcontractor to the Prime Contractor included all the mandatory experience elements required by Mandatory Experience Requirement C.1.</p> <p>Can Canada confirm if that change is acceptable?</p>	
<p><b>#7-</b> Annex C: Reference 4</p> <p>Company X provides all of the functional services specified under requirements a, b, c and d to customers in Canada using a service desk and operations centre in Canada. However, these customers may not be considered a managed IP Telephony Service under the strictest interpretation of Canada's definition of the term, although we would consider the difference between "maintained" and "managed" to be a commercial distinction rather than functional.</p> <p>Company X also provides the services specified under requirements a, b and d to customers around the world using a managed and/or hosted IP Telephony Service that would comply with the strictest interpretation of Canada's definition of the term.</p> <p>Company X's request therefore is that Canada confirm that they would consider Company X's maintained customers in Canada to qualify as an IP Telephony Service under their definition of the term. Alternatively, we would request that Canada allow Company X to enter two references under Reference 4, one based outside of Canada, in order to satisfy all of the requirements as described above. We believe that this would allow Company X to fully demonstrate that it currently provides all of the services requested by Canada.</p>	<p>Please refer to the new version of Annex C attached hereto this amendment.</p>
<p><b>#8-</b> Annex C: Reference 5</p> <p>Company X provides all the services specified under requirements a, c, e and f to customers in Canada using systems located in Canada. However, these customers may not be considered</p>	<p>Canada will not make the suggested change.</p>

<p>a managed IP Telephony Service under the strictest interpretation of Canada's definition of the term.</p> <p>Company X also provides the services specified under requirements a, c, d, e and f to customers around the world using a managed and/or hosted IP Telephony Service that would comply with the strictest interpretation of Canada's definition of the term.</p> <p>With regards to requirement b (bilingual requirements), Company X has translated all of its external websites, including online help and online menus, into French, but as of today the way to access this is via Company X.fr. This means that contact details etc are for Company X's team in France, not Canada.</p> <p>In addition, Company X now has a multilingual support site which provides online menus, help and documentation in French and English (as well as several other languages) which would currently satisfy requirements a, b and f. Although currently hosted in Switzerland, Company X can assure Canada that to port this version of the site to Canada and allow Canadian users to switch between the two languages is a relatively simple task, but as of today it does not provide access to the service orders, reports and metrics being requested.</p> <p>Company X's request therefore is that:</p> <ul style="list-style-type: none"><li>o Canada allows Company X to enter two references under Reference 5, one based outside of Canada, in order to satisfy requirements a, c, d, e and f as described above. We believe that this would allow Company X to fully demonstrate that it currently satisfies requirements a, c, d, e and f.</li><li>o Canada either removes the mandatory requirement for a reference as to bilingual website support accompanied by a plan to deliver such a service upon successful RFP award, or allows Company X to provide a separate customer reference as to requirement b in isolation.</li></ul>	
<p><b>#9-</b> If Company Y were to combine two references for a single Reference Requirement would this be acceptable to SSC to be considered compliant?</p>	<p>References cannot be combined for mandatory experience requirement C.1.</p>

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ALL OTHER TERMS AND CONDITIONS OF THIS INVITATION TO QUALIFY  
REMAIN UNCHANGED.

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Following is a summary of Amendments issued to date to this Invitation to Qualify (ITQ):

<b>Document Tracking</b>	<b>Date</b>	<b>Description</b>
Amendment No. 001	August 18, 2014	Delete Annexes G and H which no do apply to this ITQ
Amendment No. 002	August 25, 2014	Extension and published responses to questions
Amendment No. 003	September 4, 2014	Extension to the ITQ closing date
Amendment No. 004	September 12, 2014	Extension to the ITQ closing date
Amendment No. 005	September 15, 2014	Make changes and publish responses to questions

## Annex C: ITQ Reference Project Forms

Considering that the Workplace Communication Services will be critical to Canada's operation in serving Canadians, and may be implemented to over 170,000 users in 3,000+ locations across Canada, SSC has defined minimum past experience criteria for Respondents to qualify.

The Respondent's ITQ mandatory criteria are detailed in this Annex C, ITQ Reference Project Forms, annexes C.1 to C.5 inclusive.

SSC will verify all claims made by ITQ Qualified Respondents during the RRR phase with respect to the experience proposed for the ITQ mandatory experience criteria.

The following definitions apply to the ITQ Reference Project Forms only:

Service	ITQ Definition
IP Telephony service	A service implemented and managed by the Respondent and either hosted in the Respondent's data centres, or at Customer data centres, that provides IP-based telephony service accessible using IP Telephones and Softphones. The IP Telephony service allows voice communication over the client IP networks and calls to/from the PSTN.
Instant Messaging and Presence service	A service implemented and managed by the Respondent and hosted in the Respondent data centres, or implemented by the Respondent and hosted in the client data centres, that provides Instant Messaging and Presence accessible over the client IP network using software installed on client PCs.
Desktop Video service	A service implemented and managed by the Respondent and hosted in the Respondent data centres, or implemented by the Respondent and hosted in the client data centres, that provides video communication over the client IP network using software installed on client PCs.
Customer Site	A unique civic address location where the service is provided to a customer other than the Respondent.
99.9% service availability per month	A maximum of 45 minutes per month during which a service was not available to a customer, excluding approved maintenance windows.
Canadian Presence	The Respondent itself has a physical office located in Canada and employs a staff of at least 500 employees working full time in Canada.

<b>Annex C.1: ITQ Reference Project Form</b>	
<b>Respondent</b>	
<b>Name</b>	
<b>Address</b>	
<b>Mandatory Experience Requirement #1</b>	
<p>The Respondent must have provided an IP Telephony service (see definition of this term) to a Customer for a period of at least 24 continuous months (which can include the implementation phase) in the last 5 years prior to the closing date of this ITQ, where the IP Telephony service, as implemented, met or exceeded all of the following:</p> <ul style="list-style-type: none"> <li>a. a minimum of 2,500 users in total;</li> <li>b. a minimum of 15 Customer Sites;</li> <li>c. a minimum of 2 Customer Sites were separated by a minimum of 1000 km;</li> <li>d. a minimum of 2 Customer Sites were located in 2 different provinces in Canada; and</li> <li>e. a minimum of 99.9% for monthly service availability, which excludes any LAN or WAN failure at a Customer Site.</li> </ul>	
<b>Reference Project for Mandatory Experience Requirement #1</b>	
<b>Entity under contract to Customer Organization to perform the reference project</b>	
<b>Project Name</b>	
<b>Project Duration (including start date, completion of implementation and end date, if applicable)</b>	
<b>General Project Description (e.g. work performed, experienced gained)</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing IP Telephony service for a Customer with a minimum of 2,500 users in total</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing IP Telephony service for a Customer with a minimum of 15 Sites</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing IP Telephony service where a minimum of 2 of the 15 Customer Sites were separated by a minimum of 1000 km</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing IP Telephony service where a minimum of 2 of the 15 Customer Sites were located in 2 different provinces</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing IP Telephony service for a Customer with a minimum of 99.9% for monthly service availability, which excludes any LAN or WAN failure at a Customer Site (Respondents should note that being under contract to deliver a minimum of 99.9% service availability does not actually demonstrate the service availability actually provided)</b>	

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<b>Name of customer Organization</b>	
<b>Customer Organization Primary Contact Name</b>	
<b>Customer Organization Primary Contact Telephone</b>	
<b>Customer Organization Primary Contact Email</b>	
<b>Customer Organization Backup Contact Name</b>	
<b>Customer Organization Backup Contact Telephone</b>	
<b>Customer Organization Backup Contact Email</b>	



<b>Annex C.2: ITQ Reference Project Form</b>	
<b>Respondent</b>	
<b>Name</b>	
<b>Address</b>	
<b>Mandatory Experience Requirement #2</b>	
<p>The Respondent must have provided Instant Messaging and Presence service (see definition of this term) to one or more Customers for a period of at least 6 continuous months (which can include the implementation phase) in the last 5 years prior to the closing date of this ITQ, where the Instant Messaging and Presence service, as implemented, met or exceeded all of the following:</p> <p>a. a minimum of 500 users in total (across one or more Customers); and</p> <p>b. a minimum of 2 Customer Sites.</p> <p>Respondents who are relying on work done for multiple Customers should submit multiple forms, each describing the work done for one Customer (whether in the Respondent's capacity as the prime contractor or as a subcontractor). The period of "6 continuous months" can be different for each of the Customers served.</p>	
<b>Reference Project for Mandatory Experience Requirement #2</b>	
<b>Customer Organization receiving services for the reference project</b>	
<b>If applicable, prime contractor for whom the Respondent performed the work (if no prime contractor is indicated, the Respondent is indicating that it performed the work directly for the Customer)</b>	
<b>Project Name</b>	
<b>Project Duration (including start date, completion of implementation and end date, if applicable)</b>	
<b>General Project Description (e.g. work performed, experienced gained)</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing Instant Messaging and Presence service for a Customer with a minimum of 500 users in total (if using multiple Customers to demonstrate this experience, indicate the number of users for each Customer)</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing Instant Messaging and Presence service with a minimum of 2 Sites for one or more Customers</b>	
<b>Customer Organization Primary Contact Name (if Respondent performed the work directly for the Customer)</b>	
<b>Customer Organization Primary Contact Telephone</b>	
<b>Customer Organization Primary Contact Email</b>	
<b>Customer Organization Backup Contact Name</b>	
<b>Customer Organization Backup Contact Telephone</b>	
<b>Customer Organization Backup Contact Email</b>	
<b>Prime Contractor Primary Contact Name (if Respondent performed the work as a subcontractor)</b>	
<b>Prime Contractor Primary Contact Telephone</b>	
<b>Prime Contractor Primary Contact Email</b>	
<b>Prime Contractor Backup Contact Name</b>	

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<b>Prime Contractor Backup Contact Telephone</b>	
<b>Prime Contractor Backup Contact Email</b>	

<b>Annex C.3: ITQ Reference Project Form</b>	
<b>Respondent</b>	
<b>Name</b>	
<b>Address</b>	
<b>Mandatory Experience Requirement #3</b>	
<p>The Respondent must have provided Desktop Video service (see definition of this term) to one or more Customers for a period of at least 6 continuous months (which can include the implementation phase) in the last 5 years prior to the closing date of this ITQ, where the Desktop Video service, as implemented, met or exceeded all of the following:</p> <p>a. a minimum of 100 users in total (across one or more Customers);</p> <p>b. a minimum of 2 Customer Sites.</p> <p>Respondents who are relying on work done for multiple Customers should submit multiple forms, each describing the work done for one Customer (whether in the Respondent's capacity as the prime contractor or as a subcontractor). The period of "6 continuous months" can be different for each of the Customers served.</p>	
<b>Reference Project for Mandatory Experience Requirement #3</b>	
<b>Customer Organization receiving services for the reference project</b>	
<b>If applicable, prime contractor for whom the Respondent performed the work (if no prime contractor is indicated, the Respondent is indicating that it performed the work directly for the Customer)</b>	
<b>Project Name</b>	
<b>Project Duration (including start date, completion of implementation and end date, if applicable)</b>	
<b>General Project Description (e.g. work performed, experienced gained)</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing Desktop Video service for a Customer with a minimum of 100 users in total (if using multiple Customers to demonstrate this experience, indicate the number of users for each Customer)</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing Desktop Video service with a minimum of 2 Sites for one or more Customers</b>	
<b>Name of customer Organization (if Respondent performed the work directly for the Customer)</b>	
<b>Customer Organization Primary Contact Name</b>	
<b>Customer Organization Primary Contact Telephone</b>	
<b>Customer Organization Primary Contact Email</b>	
<b>Customer Organization Backup Contact Name</b>	
<b>Customer Organization Backup Contact Telephone</b>	
<b>Customer Organization Backup Contact Email</b>	
<b>Prime Contractor Primary Contact Name (if Respondent performed the work as a subcontractor)</b>	
<b>Prime Contractor Primary Contact Telephone</b>	

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<b>Prime Contractor Primary Contact Email</b>	
<b>Prime Contractor Backup Contact Name</b>	
<b>Prime Contractor Backup Contact Telephone</b>	
<b>Prime Contractor Backup Contact Email</b>	

<b>Annex C.4: ITQ Reference Project Form</b>	
<b>Respondent</b>	
<b>Name</b>	
<b>Address</b>	
<b>Mandatory Experience Requirement #4</b>	
<p>The Respondent must have provided to a Customer a centralized service desk and network operations center to manage an IP Telephony service (see definition of this term) for a period of at least 24 continuous months (which can include the implementation phase) in the last 5 years prior to the closing date of this ITQ, where the service desk and network operations center it provided met or exceeded all of the following:</p> <ul style="list-style-type: none"> <li>a. provided 7 day x 24 hour x 365 day service monitoring;</li> <li>b. provided 7 day x 24 hour x 365 day change and incident tracking;</li> <li>c. provided bilingual (English and French) phone support; and</li> <li>d. provided 7 day x 24 hour x 365 day incident escalations.</li> </ul>	
<b>Reference Project for Mandatory Experience Requirement #4</b>	
<b>Entity under contract to Customer Organization to perform the reference project</b>	
<b>Project Name</b>	
<b>Project Duration (including start date, completion of implementation and end date, if applicable)</b>	
<b>General Project Description (e.g. work performed, experienced gained)</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing 7 day x 24 hour x 365 day service monitoring</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing 7 day x 24 hour x 365 day change and incident tracking</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing bilingual (English and French) phone support</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing 7 day x 24 hour x 365 day incident escalations</b>	
<b>Location (City and Country) of the centralized service desk and network operations center. If the location is outside of Canada, the address of the Respondent's physical office located in Canada and the number of employees the Respondent employs working full time in Canada.</b>	
<b>Name of Customer Organization</b>	
<b>Customer Organization Primary Contact Name</b>	

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<b>Customer Organization Primary Contact Telephone</b>	
<b>Customer Organization Primary Contact Email</b>	
<b>Customer Organization Backup Contact Name</b>	
<b>Customer Organization Backup Contact Telephone</b>	
<b>Customer Organization Backup Contact Email</b>	

<b>Annex C.5: ITQ Reference Project Form</b>	
<b>Respondent</b>	
<b>Name</b>	
<b>Address</b>	
<b>Mandatory Experience Requirement #5</b>	
<p>The Respondent must have provided to a Customer, customer-accessible service portals located in Canada for an IP Telephony service (see definition of this term) for a period of at least 24 continuous months (which can include the implementation phase) in the last 5 years prior to the closing date of this ITQ, where the service portal(s) met or exceeded all of the following:</p> <ul style="list-style-type: none"> <li>a. provided 7 day x 24 hour x 365 day on-line access using a web browser;</li> <li>b. provided bilingual (English and French) online help and online menus;</li> <li>c. provided access to incident tickets and change requests;</li> <li>d. provided access to service reports and service level metrics;</li> <li>e. provided access to service orders; and</li> <li>f. provided access to service documentation including operations guides and procedures.</li> </ul>	
<b>Reference Project for Mandatory Experience Requirement #5</b>	
<b>Entity under contract to Customer Organization to perform the reference project</b>	
<b>Project Name</b>	
<b>Project Duration (including start date, completion of implementation and end date, if applicable)</b>	
<b>General Project Description (e.g. work performed, experienced gained)</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing 7 day x 24 hour x 365 day on-line access using a web browser</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing bilingual (English and French) online help and online menus</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing access to incident tickets and change requests</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing access to service reports and service level metrics</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing access to service orders</b>	
<b>Specific description regarding that project demonstrating the Respondent's experience in providing access to service documentation including operations guides and procedures</b>	
<b>Name of Customer Organization</b>	
<b>Customer Organization Primary Contact Name</b>	
<b>Customer Organization Primary Contact Telephone</b>	
<b>Customer Organization Primary Contact Email</b>	
<b>Customer Organization Backup Contact Name</b>	
<b>Customer Organization Backup Contact Telephone</b>	
<b>Customer Organization Backup Contact Email</b>	

