



**RETURN RESPONSES TO:  
RETOURNER LES  
RÉPONSES À :**

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**INVITATION TO QUALIFY  
INVITATION À SE QUALIFIER**

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<b>Title - Sujet</b> Data Centre Server and Storage Infrastructure Infrastructure de serveur et de stockage pour les centres de données	
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# INVITATION TO QUALIFY (ITQ) DATA CENTRE SERVER AND STORAGE INFRASTRUCTURE (DCSSI) FOR SHARED SERVICES CANADA (SSC)

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- Form 1: ITQ Submission Form
- Form 2: Federal Contractors Program for Employment Equity – Certification
- Form 3: OEM Certification Form
- Form 4: Pricing Commitment

## PART 1 GENERAL INFORMATION

### 1.1 Introduction

- 1.1.1 This Invitation to Qualify (ITQ) is neither a Request for Proposal (RFP) nor a solicitation of bids or tenders and is intended only to pre-qualify suppliers. Together this ITQ, the Review and Refine Requirements (RRR) phase and the subsequent bid solicitation(s) are the three parts of the solicitation process. No contract will result from this ITQ.
- 1.1.2 The pre-qualified suppliers will be referred to as the Qualified Respondents in this solicitation process. Only the Qualified Respondents will be permitted to bid on the subsequent bid solicitation(s). Below are the intended phases of the solicitation process. Each phase is briefly described in the attached Annex A.

**Table 1: Solicitation Process**

Invitation to Qualify (ITQ)	Qualification Phase
Review and Refine Requirements (RRR)	Only Qualified Respondents will have an opportunity to enhance their understanding of the Data Centre Server and Storage Infrastructure (DCSSI) requirements
Bid solicitations (RFSA/RFP)	Only Qualified Respondents can submit a bid(s)

- 1.1.3 DCSSI currently consists of 4 Categories, of which 3 Categories are in scope of this ITQ. Additional Categories may follow in a subsequent ITQ or bid solicitation. The criteria defined in this ITQ are strictly for qualification purposes and the criteria and categories for future bid solicitations will be further defined at RRR.
- 1.1.4 Respondents may submit responses for one or more Categories. Canada will evaluate each Category separately. The ITQ evaluation criteria for each Category will focus on the Respondent's experience delivering the requirements of that Category.
- 1.1.5 Respondents who meet the mandatory ITQ experience requirements of a Category will qualify to proceed to the subsequent phase of the procurement process for that Category.
- 1.1.6 SSC may run a second qualification round for one or more Categories if the first round of the ITQ Phase does not, in Canada's opinion, result in a sufficient number of Qualified Respondents.
- 1.1.7 For Categories that result in a sufficient number of Qualified Respondents, SSC may choose, in its own discretion, to proceed to subsequent phases while SSC runs a second qualification round for other Categories.
- 1.1.8 Respondents who do not successfully qualify at the ITQ Phase for a Category will not be able to participate in subsequent procurement phases for that Category.
- 1.1.9 Canada reserves the right to cancel or combine or separate one or more Categories at any time during the ITQ phase or any other phase of the procurement process. Given that this ITQ or the subsequent bid solicitation may be cancelled by Canada in part or in its entirety at any time in accordance with the applicable terms, it may not result in the subsequent procurement process described in this document. Because the ITQ is not a request for a proposal, suppliers who submit a response can choose not to bid on the subsequent bid solicitation.
- 1.1.10 The ITQ is divided into the following parts:
- Part 1 **General Information:** provides a general description of the requirement;
- Part 2 **Respondent Instructions:** provides the instructions, clauses and conditions applicable to the ITQ;
- Part 3 **Response Preparation Instructions:** provides suppliers with instructions on how to prepare their response;

Part 4 **Evaluation Procedures and Basis of Qualification:** indicates how the responses will be evaluated and the basis of qualification;

Part 5 **Certifications:** includes the certifications to be provided with responses.

## 1.2 Terminology

- 1.2.1 All elements of this document that are identified by “must” or “mandatory” are mandatory. To successfully qualify for further phases of the procurement, the Responses must meet all mandatory requirements.
- 1.2.2 The use of the phrase “is requested to” or “should” indicates that it is preferred, but not mandatory, that the Respondents comply with the instructions provided. Failure to comply will not result in being disqualified on that basis alone.

## 1.3 Overview of the Requirement

- 1.3.1 The anticipated DCSSI requirements consist of the provisioning of pre-configured server and storage devices, Converged Infrastructure, Virtual Servers, and a Cloud Management Platform installed and managed on premises in SSC data centres across Canada. As set forth in the Request for Information (RFI), Shared Services Canada has standardized on a number of application suites and infrastructure standards for leveraging converged solutions composed of x86 based architectures to support hypervisors focused on Windows and Linux OS support. SSC will continue to pursue setting standards to meet its business needs for the forthcoming supply arrangements in conjunction with input from industry to ensure such standards are supportable and sustainable. Standards set forth in the supply arrangements and any other contracts resulting from this procurement process will encourage an open and inter-operable environment.
- 1.3.2 SSC will give special attention to the use of Converged Infrastructure and Virtual Servers.
- 1.3.3 Converged Infrastructure is the name generally used to describe a pre-engineered set of servers, storage, networking and security systems that are integrated into shared pools of interoperable resources and managed through a common management and orchestration platform. While CIs can be deployed as bare-metal servers, in most cases the physical components are virtualized using hypervisor technologies.
- 1.3.4 Virtual Servers, as described in this ITQ, represents the provisioning of a private cloud solution on SSC premises, where the underlying infrastructure is owned and managed by the vendor, and purchased by SSC on a capacity on demand basis. The unit of consumption is an individual operating system instance running on a physical server.
- 1.3.5 The results of using either Converged Infrastructure or Virtual Servers are a highly automated, cost-efficient infrastructure with the ability to respond quickly to changing business requirements without the need to physically reorganize infrastructure that is already deployed, or acquire new infrastructure. The Converged Infrastructure or Virtual Servers are sized and deployed based on templates that allow for implementation and growth with a predefined approach. This removes the planning and configuration burdens of traditional deployments and the heavy reliance on human interaction during the provisioning phase. Their respective simplified architectures accelerate deployment of new capacity, provides greater flexibility of services and increased efficiency of deployed capacity, while lowering operational risks.
- 1.3.6 For both Converged Infrastructure and Virtual Servers, SSC will require “general purpose platforms” used to host the large majority of partner workloads (e.g. common J2EE, .Net, Commercial off-the-Shelf (COTS) Application Hosting) and “special purpose platforms” that are geared to particular needs not well suited for the general purpose platform (e.g. high performance computing, mainframe, VoIP Gateway Appliance).
- 1.3.7 The use of Converged Infrastructure and Virtual Servers provide the blueprint for SSC to accelerate the provisioning of services and applications, and will be utilized to deploy the large majority of workloads within each Shared Services Canada (SSC) DC as the infrastructure of choice.

1.3.8 The anticipated DCSSI requirements are summarized in Table 2 (below) with more a complete description of the individual categories and a responsibility matrix available in Annex B Section 4 (Procurement Strategy) and Section 5 Responsibility matrix. SSC will finalize the structure of the Categories, and possible sub-categories within each Category, during the Review and Refine Requirements Phase.

**Table 2: DCSSI Requirements Summary**

Category	Category Name	Summary Description
1	<b>Server and Storage Infrastructure</b>	General and specific purpose converged infrastructure based on X86 or RISC architecture for the purposes of running Windows and Linux or Unix operating systems. Standalone servers and physical and virtual storage product solutions to support online and offline storage requirements.
2	<b>Virtual Servers</b>	General and specific purpose virtual x86 servers for the purpose of running Windows and Linux operating systems using a capacity on demand type model.
3	<b>Cloud Management Platform</b>	Single Cloud Management Platform, covering elements such as: <ul style="list-style-type: none"> <li>- self-service portal</li> <li>- service catalogue</li> <li>- chargeback/show back</li> <li>- capacity management</li> <li>- performance management</li> <li>- configuration and change management</li> <li>- orchestration</li> <li>- external cloud connector</li> <li>- life cycle management</li> <li>- option for provisioning of server, storage and interconnectivity</li> </ul>
4	<b>Platform Software Contracts (OUT OF SCOPE OF THIS ITQ)</b>	To meet its final end state IT infrastructure software requirements, SSC plans to rationalize, standardize and consolidate the software product lists, in alignment with its end state service offerings and service catalogue, to reduce and/or eliminate duplication of functionality.  <u>This activity will be conducted separately and is not in scope of this ITQ.</u>

1.3.9 This ITQ is being issued by SSC. It is intended that the contract(s) resulting from any subsequent bid solicitation will be used by SSC to provide shared services to its clients, which include SSC itself, those government institutions for whom SSC's services are mandatory at any point during the Contract Period, and those other organizations for whom SSC's services are optional at any point during the Contract Period and that choose to use those services from time to time. This solicitation process does not preclude SSC from using another method of supply for these or other entities of the Government of Canada with the same or similar needs.

**1.4 National Security Exception**

1.4.1 The procurement of the DCSSI Services is subject to a National Security Exception and, as a result, none of the trade agreements apply to this procurement.

**1.5 Data Sovereignty**

1.5.1 The Government of Canada (GC) has an obligation to protect personal information of Canadians under the *Privacy Act and the Access to Information Act*. Additionally, the GC has the responsibility to ensure that security threats, risks and incidents must be proactively managed to help protect the government's critical assets, information and services, as well as national security.

- 1.5.2 All information managed by the GC requires protection against unauthorized access, including information that is made publicly available. In order to ensure this, the anticipated solicitation may include any or all of the following requirements:
- a) Canada's may order the destruction or deletion of GC data;
  - b) GC data in transit must be secured appropriately and must not be saved, copied or stored between the starting and end points;
  - c) GC data at rest must remain within the geographic boundaries of Canada; and
  - d) The Contractor must comply with the GC privacy and security policy instruments and practices, and recognition of the GC notification regarding privacy and security breaches.
- 1.5.3 Canada may restrict vendors requiring access to data to those companies who can demonstrate their immunity to foreign legislation.

## **1.6 Conflict of Interest – Unfair Advantage**

- 1.6.1 In order to protect the integrity of the procurement process, Respondents are advised that Canada may reject a response in the following circumstances:
- a) if the Respondent, any of its affiliates or subcontractors, or any of their respective employees or former employees was involved in any manner in the preparation of the strategies and documentation related to this procurement process or is in any situation of conflict of interest or appearance of conflict of interest;
  - b) if the Respondent, any of its affiliates or subcontractors, or any of their respective employees or former employees had access to information related to the bid solicitation that was not available to other suppliers and that would, in Canada's opinion, give or appear to give the Respondent an unfair advantage.
- 1.6.2 In this regard, Canada advises that it has used the services of a number of private sector consultants/contractors in preparing strategies and documentation related to this procurement process, including the following:
- a) PricewaterhouseCoopers Canada LLP
  - b) TEKsystems Inc.
  - c) Eagle Professional Resources Incorporated
- 1.6.3 The experience acquired by a Respondent who is providing or has provided the goods and services described in the ITQ (or similar goods or services) to Canada will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This Respondent remains, however, subject to the criteria established above.
- 1.6.4 If Canada intends to disqualify a response under this section, the Contracting Authority will inform the Respondent and provide the Respondent an opportunity to make representations before making a final decision. Respondents who are in doubt about a particular situation should contact the Contracting Authority before the closing date. By submitting a response, the Respondent represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Respondent acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.

## PART 2 RESPONDENT INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

- 2.1.1 All instructions, clauses and conditions identified in the ITQ 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 Respondents who submit a response agree to be bound by the instructions, clauses and conditions of the ITQ.
- 2.1.3 The 2003 (2014-06-26) Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the ITQ, except that:
- a) Wherever the term "bid solicitation" is used, substitute "Invitation to Qualify";
  - b) Wherever the term "bid" is used, substitute "response";
  - c) Wherever the term "Bidder(s)" is used, substitute "Respondent(s)";
  - d) Subsection 5(4), which discusses a validity period, does not apply, given that this ITQ invites suppliers simply to qualify.
  - e) 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"
  - f) Subsections 4 and 5 of section 1 are deleted.
  - g) Sections 6 and 7 are deleted:
  - h) The title of Section 10 is amended to read "Legal Capacity and Ownership and Control Information", the first paragraph is numbered as 1 and the following is added:
    - (i) The Respondent must provide, if requested by the Contracting Authority, the following information as well as any other requested information related to the ownership and control of the Respondent, its owners, its management and any related corporations and partnerships:
      1. An organization chart for the Respondent showing all related corporations and partnerships;
      2. A list of all the Respondent's shareholders and/or partners, as applicable; if the Respondent is a subsidiary, this information must be provided for each parent corporation or partnership, up to the ultimate owner; and
      3. A list of all Respondent's directors and officers, together with each individual's home address, date of birth, birthplace and citizenship(s); if the Respondent is a subsidiary, this information must be provided for each parent corporation or partnership, up to the ultimate owner. In the case of a joint venture Respondent, this information must be provided for each member of the joint venture. The Contracting Authority may also require that this information be provided in respect of any subcontractors specified in a bid
      4. For the purposes of this section, a corporation or partnership will be considered related to another party if
        - a. they are "related persons" or "affiliated persons" according to the Canada Income Tax Act;
        - b. the entities have now or in the two years before the closing date had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
        - c. 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.
  - i) For the purposes of this ITQ, the PWGSC policies specifically referenced within the Standard Instructions are adopted as SSC policies.



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.

## 2.2 Submission of Responses

- 2.2.1 Responses must be addressed to the Contracting Authority and the **e-mail address** by the date and time indicated on page 1 of the ITQ.
- 2.2.2 Due to the nature of the ITQ, responses delivered by hand, mail or courier or transmitted by facsimile to Shared Services Canada will not be accepted.
- 2.2.3 Suppliers are requested to send an e-mail notification to [Consultationspc.sscconsultation@ssc-spc.gc.ca](mailto:Consultationspc.sscconsultation@ssc-spc.gc.ca) prior to the closing date indicating their intention to submit a response.

## 2.3 Enquiries and Comments

- 2.3.1 All enquiries and comments, including suggestions to improve the anticipated solicitation process, regarding the ITQ and the attached annexes, must be submitted in writing to the Contracting Authority identified hereunder in accordance with the periods set out in the Table 3 below. Enquiries received after the time specified for each period may not be answered.

Contracting Authority: Solinda Phan  
 E-mail Address: ConsultationSPC.SSCConsultation@spc-ssc.gc.ca  
 Telephone: (613) 302-6895

- 2.3.2 While Canada has provided the schedule detailing how it will manage the enquiries process, Respondents should make enquiries as early as possible and should not make assumptions about the nature of the requirements of this Invitation to Qualify (ITQ). Respondents who do not raise issues and questions they may have during the enquiries period do so at their own risk.

**Table 3: Periods for Submitting Questions**

Period 1 - Initial Question Period	Period 2 – Final Question Period
Initial question period for Respondents begins following the initial ITQ posting date and ends 10 calendar days later at 23:59 EDT.	The Final question period raising issue(s) only to Canada’s initial response(s), will conclude 14:00 EDT on the third calendar day after the response(s) to the questions submitted during Period 1, the Initial Question Period, are posted on buyandsell.gc.ca.
Canada will respond throughout the period and afterwards to the questions from suppliers.	Canada will then respond throughout the period to the questions from suppliers.

- 2.3.3 Respondents should reference as accurately as possible the section and numbered item of the solicitation process to which the enquiry relates. Care should be taken by respondents 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 Respondent do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all respondents. Enquiries not submitted in a form that can be distributed to all respondents may not be answered by Canada.
- 2.3.4 **Omitted Documents:** Should a Respondent omit a document in their response, Canada may ask that the Respondent provide the document. The Respondent must submit the document within the time period set by the Contracting Authority, failing which the response will be evaluated without the omitted document.

## 2.4 Composition of Core Team (if applicable)

- 2.4.1 A Core Team is not permitted for Category 1. It is however permitted for Categories 2 and 3.
- 2.4.2 The Core Team may be comprised of a maximum of 1 ITQ Response Lead and up to 2 additional firms, hereto referred as Core Team Members 2 and 3.
- 2.4.3 If a Respondent chooses to use a Core Team Member's experience in its technical response for Categories 2 or 3, the Respondent must indicate the relevant company/organization names that comprise its Core Team in the ITQ Submission Form (Form 1).
- 2.4.4 Once a Respondent has identified itself as the ITQ Response Lead, it must remain the ITQ Response Lead and cannot switch roles with any member of its team for the duration of the procurement process. This is because the contract(s) or arrangement(s) will be awarded to the ITQ Response Lead. The ITQ Response Lead will be responsible for all deliverables. The Core Team Members are there to support the ITQ Response Lead.
- 2.4.5 Respondents may use the services of additional subcontractors as necessary during any resulting contract(s) or arrangement(s), but the qualifications of those subcontractors will not be evaluated as part of the ITQ qualification process and those subcontractors are not considered part of the Core Team.
- 2.4.6 A Respondent's Core Team must continue to consist of the same Core Team Members identified in the Response to this ITQ for subsequent phases of the DCSSI procurement process, up to and including full DCSSI implementation plus 2 years after award. If, during the Contract Period, the Contractor determines that, for service delivery reasons, it requires a change to the role of its Core Team Members, it may submit a written request to the Contracting Authority detailing its reasons for the change. Changes in roles may only be made following receipt of written approval from the Contracting Authority.

## **PART 3 RESPONSE PREPARATION INSTRUCTIONS**

### **3.1 Response Preparation Instructions**

3.1.1 **Copies of Response:** Canada requests that Respondents provide their response in separate sections, as follows:

- a) Section I: Qualification Response per Category (1 soft copy of each)
  - i) Signed and completed ITQ Submission Form(Form 1)
  - ii) Separate response to the Mandatory Evaluation Criteria for each Category
  - iii) Signed and completed Pricing Commitment (Form 4)
  - iv) Proof of registry with the Industrial Security Program
- b) Section II: Certifications (1 softcopy)
- c) Each response should be saved as:
  - i) the Respondent's name;
  - ii) the ITQ number;
  - iii) "Qualification Response for [*insert Category name*]".  
E.g. *ABC Company ITQ 10040747-A – Qualification Response for Server and Storage Infrastructure*
- d) Pricing is not a requirement and should not be included in the response. Respondents are requested not to include any brochures or promotional materials which they would like Canada to consider in their responses.

3.1.2 **Format for Response:** Canada requests that Respondents follow the format instructions described below in the preparation of their response:

- a) use 8.5 x 11 inch (216 mm x 279 mm) paper size;
- b) use a numbering system that corresponds to the ITQ;
- c) include a title page at the front of each volume of the response that includes the title, date, procurement process number, Respondent's name and address and contact information of its representative;
- d) include a table of contents; and
- e) soft copies of the responses are requested to be in a format that is compatible with Microsoft Office Suite 2003 or Adobe Acrobat 9.0.

### **3.1.3 Language for Future Communications**

Respondents are requested to identify, in the Submission Form, which of Canada's two official languages will be used for future communications with Canada regarding this ITQ and all subsequent phases of the solicitation process.

### **3.1.4 Submission of Only One Response from a Responding Group**

- a) The submission of more than one response from members of the same Responding group for each category of this ITQ is not permitted in response to this ITQ. If members of a Responding Group participate in more than one response, Canada will provide the members of the Responding Group with 2 working days to identify one response to be considered in this ITQ. Failure to meet this deadline will result in all responses being declared non-compliant and disqualified.
- b) For the purposes of this article, "**Responding 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 ITQ if:

- i) they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
  - ii) they are "related persons" or "affiliated persons" according to the *Canada Income Tax Act*,
  - iii) the entities have now or in the two years before the ITQ closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
  - iv) 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.
- c) A response provided by a Responding Group can contain Core Team Members. A Responding Group's Core Team Member(s) will be permitted as Core Team Member(s) on multiple responses.
  - d) A member of a Responding group is not permitted to be a Core Team Member to another Responding Group within the same Category. However, a member of a Responding group will be permitted as a Core Team Member to another Responding Group in a separate Category.
  - e) It will be at the discretion, of the ITQ Response Lead, to determine which RRR phase activities their Core Team Members will participate in.
  - f) Core Team Members that are identified in a response and used by a Respondent or a Responding Group to meet the ITQ criteria must be included in the Respondent's (or the Responding group's) bid to any resulting Request for Proposal, Request for Standing Offer, or Request for Supply Arrangement.

### 3.2 Section I: Qualification Response

3.2.1 A complete qualification response consists of the following:

- a) **Submission Form (requested at ITQ closing):** Respondents are requested to include Form 1 - Submission Form with their responses for each Category. It provides a common form in which Respondents can provide information required for evaluation, such as a contact name, the Respondent's Procurement Business Number, the language for future communications etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information requested by the Submission Form is incomplete or requires correction, Canada will provide the Respondent with an opportunity to do so.
- b) **Response to the Mandatory Evaluation Criteria – Attachment 4.1 (mandatory at ITQ closing):** In their ITQ response, Respondents must demonstrate their understanding of the requirements contained in this ITQ and explain how they will meet these evaluation criteria. Respondents must demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work. The response must address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the response will be evaluated. Simply repeating the statement contained in the response is not sufficient.

The Mandatory Evaluation Criteria Checklists following each Mandatory Evaluation Criterion are provided to assist Respondents in ensuring that all requirements have been addressed in their response. In order to facilitate the evaluation of the response, Canada requests that Respondents address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, Respondents may refer to different sections of their response by identifying the specific paragraph and page number where the subject topic has already been addressed.

In the Respondent's response to each evaluation criterion where experience is being evaluated, the Respondent is requested to specify the Core Team Member whose experience is being submitted for evaluation.

Where the Respondent's experience is required, Respondents can only submit, in their Response, the corporate experience of the following in addition to their own experience, if applicable:

- i) Joint venture partners;
- ii) Parent organization;
- iii) Any subsidiary organization; and
- iv) Any affiliate organization.

Where a Core Team Member's experience is permitted, Respondents can only submit, in their Response, the corporate experience of the following in addition to Respondent's experience (as set out above), if applicable:

- i) A Core Team Member;
- ii) A Core Team Member's parent organization;
- iii) A Core Team Member's subsidiary organization; and
- iv) A Core Team Member's affiliate organization.

The experience of a corporate predecessor will be evaluated as experience of the Respondent or Core Team Member if:

- i) The corporate predecessor amalgamated with another corporation to form the Respondent or Core Team Member; or
- ii) All or substantially all the assets of the corporate predecessor were acquired by the Respondent or Core Team Member, the majority of the corporate predecessor employees became employees of the Respondent or Core Team Member, and both the corporate predecessor and the Respondent or Core Team Member 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 or Core Team Member, along with all or substantially all the employees of that business unit, and the Respondent or Core Team Member continues to carry on essentially the same business as that business unit.

Respondents are not required to include customer reference information when describing corporate project experience. Generic descriptions of project experience are sufficient. The Respondents' experience will be evaluated on a simple pass/fail (i.e., compliant / non-compliant) basis. Respondents that fail to meet any of the technical evaluation criteria in Attachment 4.1 will be disqualified.

The Project References required for the Mandatory Evaluation Criteria in Attachment 4.1 may, but do not have to, be the same. The customer organization for each Project Reference must not be related to the Respondent or the Core Team Member(s) (i.e., the customer organization must not be an affiliate and must deal at arm's length with the Respondent or Core Team Member in order to be considered as a Project Reference).

Respondents are requested to indicate the page number(s) in their supporting project documentation that addresses a particular technical experience requirement.

In the case of a joint venture Respondent, each Project Reference given can be from a different joint venture member. The Project References are not required to be projects performed by the joint venture Respondent itself.

c) **Pricing Commitment (requested at ITQ closing, mandatory on request)**

Respondents are requested to submit the Pricing Commitment (Form 4) with their responses. If a Respondent does not provide a signed Pricing Commitment with its response, the Respondent must do so upon request by the Contracting Authority. Provision of a signed Pricing Commitment is a mandatory requirement for qualification pursuant to this ITQ.

d) **Security Clearance (mandatory at ITQ closing)**

Respondents must meet the security requirement outlined in section 4.3

**3.3 Section II: Certifications**

The certifications requirements are set out in part 5 – Certifications.

## **PART 4 EVALUATION PROCEDURES AND BASIS OF QUALIFICATION**

### **4.1 Evaluation Procedures**

- 4.1.1 Responses will be assessed in accordance with the entire requirement of the ITQ including the evaluation criteria.
- 4.1.2 An evaluation team composed of representatives of Canada will evaluate the responses. Canada may hire any independent consultant, or use any Government resources, to evaluate any response. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- 4.1.3 Shared Services Canada has engaged Samson and Associates as a fairness monitor for this solicitation process. The fairness monitor will not be part of the evaluation team, but will observe the evaluation of the responses with respect to Canada's adherence to the evaluation process described in this ITQ.
- 4.1.4 In addition to any other time periods established in the ITQ:
- a) **Requests for Clarifications:** If Canada seeks clarification or verification from the Respondent about its response, including certifications, the Respondent will have 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 response being declared non-compliant.
  - b) **Extension of Time:** If additional time is required by the Respondent, the Contracting Authority may grant an extension in his or her sole discretion.

### **4.2 Mandatory Evaluation Criteria**

Each response will be reviewed to determine whether it meets the mandatory requirements of the ITQ. Any element of the ITQ identified with the words "must" or "mandatory" is a mandatory requirement. Responses that do not comply with each and every mandatory requirement will be declared non-compliant and be disqualified.

The mandatory requirements are described in Attachment 4.1 and will be evaluated individually on a simple pass/fail basis.

- 4.2.1 The Respondents will not be permitted to submit an alternate customer organization or project as a reference after the closing date of this ITQ unless SSC runs a second qualification round.
- 4.2.2 By submitting a response, Respondents certify that the information provided is accurate and true.

### **4.3 Security Clearance Requirement**

- a) The following conditions should be met by ITQ closing date, but may be completed during the subsequent bid solicitation phase.
  - (i) the Respondent, not including the Core Team Members, must be registered in the Industrial Security Program (ISP) of PWGSC's Canadian Industrial Security Directorate (CISD)
- b) It is anticipated that during the subsequent phases of the procurement process and the resulting supply arrangements and contracts, Respondents will be required to meet the security clearances below, provided by CISD (as per Annex D – Security Requirements Checklist):

The Contractor must, at all times during the performance of the Contract, Standing Offer or Supply Arrangement, maintain a valid Facility Security Clearance (FSC) issued by Public Works and Government Services Canada – Industrial Security Program.

The Contractor and/or its employees must EACH maintain a valid Secret clearance issued by Canadian Industrial Security Directorate (CISD), Public Works and

Government Services Canada.

The Contractor must maintain a valid Document Safeguarding Capability (DSC) at the SECRET level issued by Public Works and Government Services Canada – Industrial Security Program.

The Contractor and/or its employees MUST NOT remove any Top Secret information or assets from the identified work site(s).

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.

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

The Contractor and its employees must comply with the provisions of the:

- (i) Justice Canada – Security of Information Act (as amended);
- (ii) Industrial Security Manual (Latest Edition).

- c) For additional information on security requirements, Respondents should consult the "Security Requirements for PWGSC Bid Solicitations - Instructions to Bidders" document (<http://ssi-iss.tpsgc-pwgsc.gc.ca/ssi-iss-services/eso-oss-eng.html>) on the Departmental Standard Procurement Documents Website.
- d) In the case of a joint venture, each member of the joint venture must meet the security requirements.
- e) Canada reserves the right to revise the security requirements following the ITQ Phase. Canada will provide the RFP/RFSA and contract security clauses at a subsequent phase of this procurement process.

#### **4.4 Basis of Qualification**

For each Category, a response must comply with the requirements of the ITQ and meet all mandatory evaluation criteria to be declared responsive.

A Respondent whose response has been declared responsive is a Qualified Respondent for the next stage of the solicitation process. However, Canada reserves the right to re-evaluate the qualification of any Qualified Respondent at any time during the solicitation process. For example, if the Respondent's security clearance changes or lapses, so that the Respondent no longer meets the requirements of this ITQ, it will no longer be a Qualified Respondent.



## **PART 5 CERTIFICATIONS AND AGREEMENTS**

Respondents are requested to provide the certifications and documentation with their response. Respondents who do not provide some or all of the certifications, or where there appear to be errors in their certifications, will be given an opportunity after closing to submit or resubmit their certifications. The certifications provided by respondents to Canada are subject to verification by Canada at any time during this solicitation process. Canada will disqualify a response if any certification made by the Respondent is found to be untrue, whether made knowingly or unknowingly, during the ITQ evaluation period or during the subsequent bid solicitation.

The Contracting Authority will have the right to ask for additional information to verify the Respondent's certification at any time during this solicitation process. Failure to comply with this request will also render the response non-compliant or any bids submitted in subsequent phases will be declared non-compliant or will constitute a default under any resulting contract that may be issued during a subsequent phase of this solicitation process.

### **5.1 Certification of Corporate Experience**

The Respondent certifies that all the information provided regarding their corporate experience and supporting material submitted with its response, particularly the information pertaining to the Respondent's experience and project scope, is true and accurate.

### **5.2 Federal Contractors Program – Certification**

- a) By submitting a response, the Respondent certifies that the Respondent, and any of the Respondent's members if the Respondent 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](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)) available from Human Resources and Skills Development Canada (ESDC) – Labour's website
- b) Canada will have the right to declare a response non-compliant if the Respondent, or any member of the Respondent if the Respondent is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of the evaluation of the response and up to the award of a contract resulting from any subsequent bid solicitation.
- c) 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.
- d) The Respondent is requested to provide the Contracting Authority with a completed Form 2 – Federal Contractors Program for Employment Equity – Certification, with their response. If the Respondent is a Joint Venture, the Respondent must provide the Contracting Authority with a completed certification for each member of the Joint Venture.

### **5.3 OEM Certification (applicable to Category 1)**

- a) Any Respondent that is not the Original Equipment Manufacturer (OEM) for every item of hardware proposed as part of its qualification response is required to submit the OEM's certification regarding the Respondent's authority to provide and maintain the OEM's hardware, which must be signed by the OEM (not the Respondent). No contract(s) resulting from any subsequent bid solicitation will be awarded to a Qualified Respondent who is not the OEM of the hardware it proposes to supply to Canada, unless the OEM certification has been provided to Canada. Respondents are requested to use the OEM Certification Form included with the ITQ. Although all the contents of the OEM Certification Form are required, using the form itself to provide this information is not mandatory. For Respondents/OEMs who use an alternate form, it is in Canada's sole discretion to determine whether all the required information has been provided. Alterations to the statements in the form may result in the response being declared non-compliant.

- b) If the hardware proposed by the Respondent originates with multiple OEMs, a separate OEM certification is required from each OEM.
- c) For the purposes of this solicitation process, OEM means the manufacturer of the hardware, as evidenced by the name appearing on the hardware and on all accompanying documentation.

#### 5.4 Former Public Servant

- a) For services requirements, Respondents in receipt of a pension or a lump sum payment are requested to provide within the Submission Form the requested information as detailed below.
- b) 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, respondents must provide the information required below before contract award. If the answer to the questions and, as applicable, the information required have not been received by the time the evaluation is completed, Canada will inform the Respondent of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the response non-compliant.
- c) Definitions: For the purposes of this clause,
  - (i) "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:
    - 1. an individual;
    - 2. an individual who has incorporated;
    - 3. a partnership made of former public servants; or
    - 4. a sole proprietorship or entity where the affected individual has a controlling major interest in the entity.
  - (ii) "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.
  - (iii) "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.
- d) **Former Public Servant in Receipt of a Pension:** As per the above definitions, if the Respondent is a FPS in receipt of a pension, then the Respondent must provide the following information, for all FPS in receipt of a pension, as applicable:
  - (i) name of former public servant;
  - (ii) date of termination of employment or retirement from the Public Service.

By providing this information, Respondents agree that the successful Respondent'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.

- e) **Work Force Adjustment Directive:** If the Respondent is a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive, then the Respondent must provide the following information:
- (i) name of former public servant;
  - (ii) conditions of the lump sum payment incentive;
  - (iii) date of termination of employment;
  - (iv) amount of lump sum payment;
  - (v) rate of pay on which lump sum payment is based;
  - (vi) period of lump sum payment including start date, end date and number of weeks;
  - (vii) 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.

## 5.5 Non-Disclosure Agreement

- 5.5.1 By submitting a response, the Respondent agrees to the terms of the non-disclosure agreement below (the "Non-Disclosure Agreement"):
- 5.5.2 The Respondent agrees to keep confidential any information it receives from Canada regarding Canada's assessment of the Respondent's Supply Chain Security Information (the "Sensitive Information") including, but not limited to, which aspect of the Supply Chain Security Information is subject to concern, and the reasons for Canada's concerns.
- 5.5.3 Sensitive Information includes, but is not limited to, any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form or otherwise and whether or not that information is labeled as classified, proprietary or sensitive.
- 5.5.4 The Respondent agrees that it will not reproduce, copy, divulge, release or disclose, in whole or in part, in whatever way or form any Sensitive Information to any person other than a person employed by the Respondent who has a security clearance commensurate with the level of Sensitive Information being accessed, without the prior written consent of the Contracting Authority. The Respondent agrees to immediately notify the Contracting Authority if any person, other than those permitted by this Article, accesses the Sensitive Information at any time.
- 5.5.5 All Sensitive Information will remain the property of Canada and must be returned to the Contracting Authority or destroyed, at the option of the Contracting Authority, if requested by the Contracting Authority, within 30 days following that request.
- 5.5.6 The Respondent agrees that a breach of this Non-Disclosure Agreement may result in disqualification of the Respondent at either the ITQ or RFP stage, or immediate termination of the resulting Contract. The Respondent also acknowledges that a breach of this Non-Disclosure Agreement may result in a review of the Respondent's security clearance and review of the Respondent's status as an eligible respondent for other requirements.
- 5.5.7 This Non-Disclosure Agreement remains in force indefinitely.

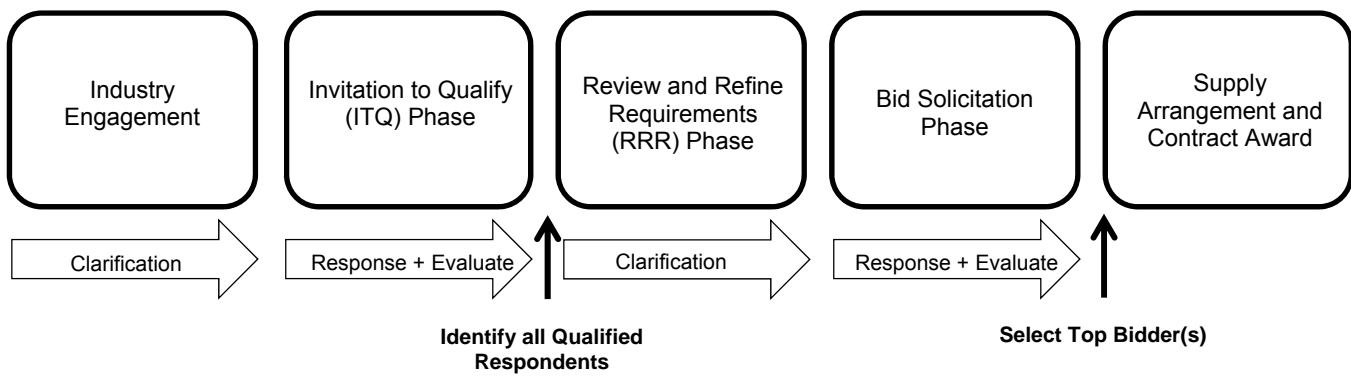
## Annex A

### PROCUREMENT PROCESS

#### Overview

The multi-phase Collaborative Procurement Approach (CPA) process is shown below in Figure 1 and summarized below in Table 4. This process will be used until the final RFP(s) or RFSA(s) are issued to the Qualified Respondents (QR) in the Bid Solicitation Phase. This approach will allow Canada to conduct due diligence with respect to the requirements with Qualified Respondents before issuing bid solicitation(s).

**Figure 1: Procurement Approach**



**Table 4: Summary of Procurement Phases**

Procurement Phase	Objectives
Industry Engagement	<ul style="list-style-type: none"> <li>Solicit feedback from Industry on Canada's requirements for IT Infrastructure Services and the procurement approach, via the Industry Engagement Day and one-on-one sessions</li> <li>Solicit feedback from Industry on Canada's proposed DCSSI strategy, via a Request for Information (RFI) and one-on-one clarification sessions</li> <li><b>This phase has been completed</b></li> </ul>
Invitation to Qualify	<ul style="list-style-type: none"> <li>Issue ITQ on BuyandSell.gc.ca</li> <li>Obtain ITQ responses from Respondents</li> <li>Evaluate ITQ responses</li> <li>Select the Qualified Respondents to continue to the Review and Refine Requirements Phase</li> </ul>
Review and Refine Requirements	<ul style="list-style-type: none"> <li>Qualified Respondents have an opportunity to enhance their understanding of the requirements</li> <li>Qualified Respondents may be required to provide their Supply Chain Security information (SCSI), which may include IT products (equipment, firmware, software, services), subcontractors list, and network diagrams</li> <li>SSC may conduct the Supply Chain Integrity (SCI) verification of the Respondents' SCSI to ensure that all IT products meet certain security and supply chain standards</li> <li>If the SCI verification is completed at the RRR phase, only vendors with qualified product lists will continue to the Bid Solicitation Phase</li> </ul>

Procurement Phase	Objectives
Bid Solicitation	<ul style="list-style-type: none"> <li>• Issue one or more solicitations to all Qualified Respondents</li> <li>• Supply Chain Integrity verification if it was not completed at the RRR phase</li> <li>• Obtain proposals from the Bidders</li> <li>• Evaluate the proposals</li> <li>• Select the successful proposals</li> </ul>
Supply Arrangement and Contract Award	<ul style="list-style-type: none"> <li>• Award the SA and contracts to the winning Bidder(s)</li> </ul>

### Invitation to Qualify Phase

The objective of the ITQ is to qualify Respondents who have experience in the provisioning and implementation of IT infrastructure services.

The Mandatory Evaluation Criteria will be evaluated individually by Category. The Mandatory Evaluation Criteria focus on the Respondent's ability to deliver the IT infrastructure, taking into consideration capacity and capability based on previous and current project experience.

Respondents who meet all the mandatory experience requirements for a given Category will become Qualified Respondents and will proceed to the Review and Refine Requirements Phase for that Category as described below.

Once the Qualified Respondents have been selected and have been notified that they have qualified for the next phase of the procurement process, Canada intends to proceed with the Review and Refine Requirements Phase. Qualified Respondents may withdraw from the process at any time by providing written notification to the Contracting Authority.

### Review and Refine Requirements Phase

Canada intends to start the Review and Refine Requirements (RRR) Phase by providing Qualified Respondents the detailed process that will be followed for this Phase to the Qualified Respondents.

During the RRR Phase, Canada may provide Qualified Respondents with information which may include, but not necessarily be limited to: Canada's outline of the anticipated requirement, portions of a draft Statement of Work (SOW), draft contractual terms and conditions. This information is intended to stimulate feedback from the Qualified Respondents in order to assist Canada in clarifying its direction and further refining the requirements of the solicitation. These interactions could include:

- a) one-on-one sessions;
- b) presentation sessions;
- c) interactive collaborative tools; and/or
- d) written questions and answers.

Canada will consider the feedback provided by Respondents when finalizing the SOW and its solicitation requirements for use in the Bid Solicitation Phase.

Once the technical requirements are finalized, Canada may request that Respondents provide the Supply Chain Security Information.

Canada may conduct a Supply Chain Integrity verification of the Respondents' IT products to ensure that all IT products meet certain security and supply chain standards. More information about this process will be provided to the Qualified Respondents during the RRR Phase.

If the Supply Chain Integrity process is completed at the RRR phase, only the Respondents who pass the Supply Chain Integrity verification will continue to be Qualified Respondents and will proceed to the Bid Solicitation Phase described below.

### Bid Solicitation Phase

During the Bid Solicitation Phase, Canada may issue one or more formal solicitations to the Qualified Respondents. The Supply Chain Integrity verification process may take place at this phase.

**Supply Arrangement and Contract Award Phase**

Any supply arrangement(s) and/or contract(s) will be awarded after completion of the Bid Solicitation Phase and any necessary internal approvals have been received.

## Annex B

### DCSSI STRATEGY

#### 1. ORGANIZATIONAL OVERVIEW

##### a. Overview of Shared Services Canada

On August 4, 2011, SSC was established by the Government of Canada. The creation of the new department resulted in SSC being responsible for approximately 95% of the Government of Canada's total IT Operational and Capital expenditures on IT infrastructure.

The *Shared Services Canada Act* and the accompanying Orders in Council mandate SSC to provide email, data centre and telecommunications services to 42 federal departments and agencies. SSC also provides the same services to other government departments and agencies on a cost-recovery basis.

In creating SSC, the department was given the clear objective to streamline, consolidate and transform the delivery of infrastructure technology and services, specifically email, data centre and network services, by improving the delivery of reliable, efficient and secure IT infrastructure services.

The establishment of Supply Arrangement(s) for the provisioning of standardized server and storage platforms constitutes a foundational element of this mandate.

##### b. Current Situation

Prior to the establishment of SSC, individual departments and agencies were responsible for the acquisition, installation, and management of their individual IT infrastructure. Over the past 20 years, this situation led to a proliferation of IT hardware and software products from hundreds of hardware manufacturers and software suppliers.

SSC currently manages more than 23,000 physical servers and more than 40,000 virtual images on behalf of 42 partner departments, and a few other departments on a cost recovery basis.

These servers currently use various operating systems, virtualization software, infrastructure middleware, and systems management tools. As well, these servers use various application development frameworks, database management systems, testing tools, and other categories of software.

Equally important, the acquisition of these devices, and associated software, was originally conducted by the individual departments, using a variety of procurement approaches. This resulted in a large number of uncoordinated contracts and license agreements, which could only be leveraged by the individual departments who owned and controlled these contract vehicles.

#### 2. Drivers for Change

##### a. Complexity

The proliferation of hardware and software infrastructure has led to many common problems:

- The use of non-standardized IT hardware and software platforms has led to interoperability issues, making the communication between applications and the movement of data more complex;
- Many computing and storage assets, having been purchased by individual organizations, are underutilized because these assets have not been available for use by other government organizations;
- Some technologies acquired by departments and agencies are based on non-standard proprietary hardware and software solutions, making the operation of these solutions often more expensive, and their conversion to standard platforms more difficult; and,

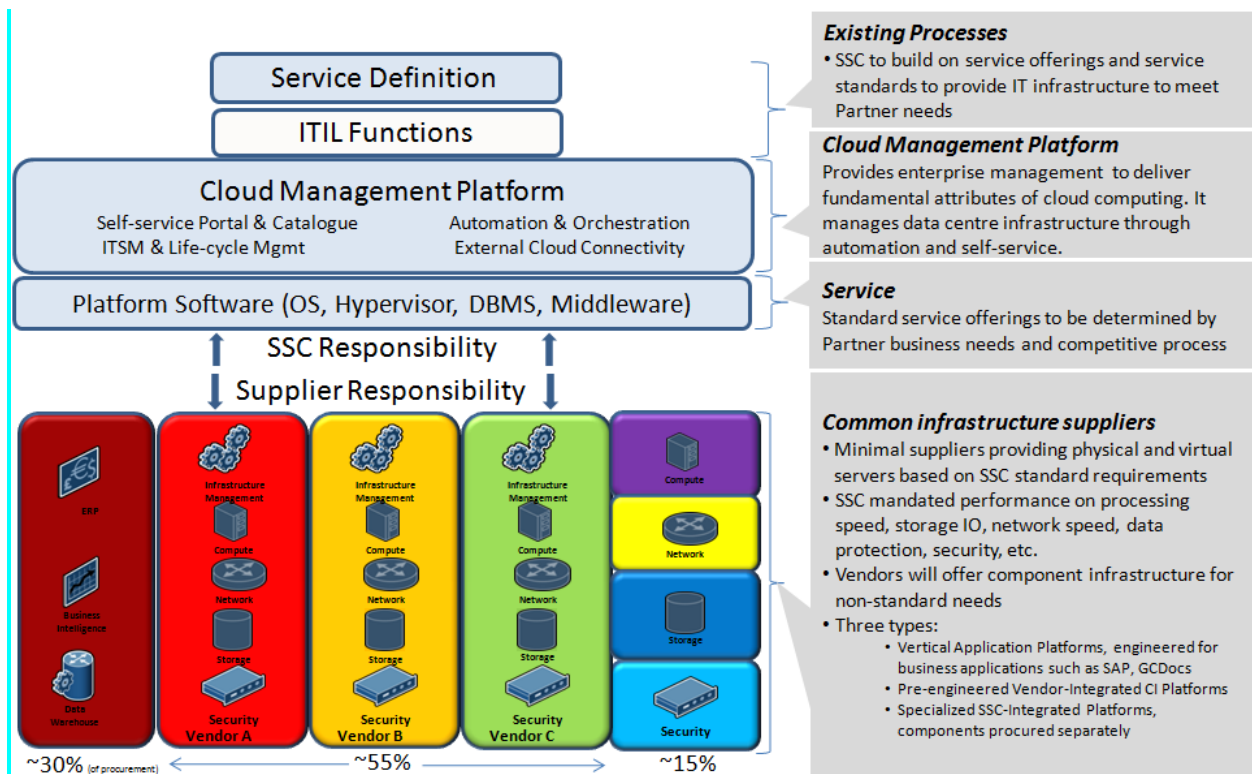
- With the proliferation of devices across government, many organizations have been unable to replace every device on a regular basis, leading to unplanned outages due to aging deficiencies.

**b. Security Pressures**

Canadian citizens and private sector organizations have become increasingly reliant on online services to conduct their affairs. It is incumbent on SSC to ensure that the underlying infrastructure utilized by government departments and agencies to deliver their program applications be safe and secure from intrusion, modification and destruction.

**3. DCSSI Diagram**

The following diagram depicts the planned end-state Data Centre Server & Storage Infrastructure (DCSSI).



**4. Procurement Strategy**

SSC's procurement strategy for DCSSI is currently separated into four Categories. These are described individually below.

Category Name	Summary Description
1 Server and Storage Infrastructure (SSI)	Standalone servers, general and specific purpose converged infrastructure or reference architecture based on X86 or Unix platforms, covering at a minimum the following elements: a. Multiple classes of standalone servers b. Multiple classes of general purpose converged infrastructure c. Multiple classes of specific purpose converged infrastructure for specialized application and database configurations



Category Name	Summary Description
	<p>d. Services such as:</p> <ul style="list-style-type: none"> <li>- installation and configuration of Government Furnished Equipment (GFE) infrastructure software, such as hypervisor and operating system</li> <li>- installation of other GFE software, such as development frameworks and database management system, on an as required basis</li> <li>- installation and configuration of network, security and storage components</li> <li>- installation of devices in SSC data centres (e.g. racking and cabling)</li> <li>- interconnectivity of device to SSC network</li> <li>- maintenance, support, break/fix, firmware update, patch management, etc.</li> <li>- capacity management</li> <li>- decommissioning</li> </ul>
<b>Storage</b>	<p>Physical and virtual storage product solutions to support online and offline storage requirements, covering at a minimum the following elements:</p> <ul style="list-style-type: none"> <li>a. Multiple classes of online storage platform(s), with storage virtualization capability</li> <li>b. Multiple classes of physical/virtual tape library platform(s), with storage virtualization capability</li> <li>c. Storage fabric</li> <li>d. Services such as: <ul style="list-style-type: none"> <li>- installation and configuration of GFE infrastructure software</li> <li>- installation of devices in SSC data centres (e.g. racking and cabling)</li> <li>- installation and configuration of network and security components</li> <li>- interconnectivity of device to SSC network</li> <li>- maintenance, support, break/fix, firmware update, patch management, etc.</li> <li>- capacity management</li> <li>- decommissioning</li> <li>- installation and configuration of GFE infrastructure software</li> </ul> </li> </ul>
<b>2</b>	<p><b>Virtual Servers</b></p> <p>General and specific purpose virtual server, on infrastructure managed by supplier on SSC premises or supplier premises, meeting the following requirements:</p> <ul style="list-style-type: none"> <li>a. Multiple classes of general purpose virtual servers based on X86 architecture <ul style="list-style-type: none"> <li>- Windows or Linux operating systems</li> <li>- Scaling capabilities for computing, storage and interconnectivity components</li> <li>- Use standard APIs for access by cloud management platform</li> </ul> </li> <li>b. Multiple classes of specific purpose virtual servers for</li> </ul>

Category Name		Summary Description
		<p>specialized application and database configurations based on X86 architecture</p> <p>c. The successful vendor will be responsible for the set up of a virtual cloud in the GoC Datacentres. The unit of consumption will be the “virtual server”. The cloud infrastructure will be purchased and consumed on a virtual server by virtual server basis</p> <p>The virtual servers must meet, at a minimum, the following operational and performance requirements:</p> <ul style="list-style-type: none"> <li>- <i>On-demand self-service</i> to support efficient provisioning of computing capabilities</li> <li>- <i>Broad network access</i> over the GC network and accessed through standard mechanisms that promote heterogeneous thin or thick client platforms</li> <li>- <i>Resource pooling</i> to maximize the use of shared computing and storage resources</li> <li>- <i>Rapid elasticity</i> to rapidly scale outward and inward commensurate with demand</li> <li>- <i>Measured service</i> to automatically monitor, control and optimize resource use, using metering capabilities based on business and performance rules for each type of service (e.g. compute, storage, bandwidth)</li> </ul>
3	<b>Cloud Management Platform</b>	<p>Single Cloud Management Platform, covering elements such as:</p> <p>a. Cloud Management Platform</p> <ul style="list-style-type: none"> <li>- Self-Service Portal</li> <li>- Service catalogue</li> <li>- Chargeback/Show Back</li> <li>- Capacity Management</li> <li>- Performance Management</li> <li>- Configuration and Change Management</li> <li>- Life-Cycle Management</li> <li>- Orchestration</li> <li>- External Cloud Connector</li> </ul> <p>b. Infrastructure solution, such as servers and storage which underpins the Cloud Management Platform</p> <p>c. Services such as:</p> <ul style="list-style-type: none"> <li>- software installation and configuration</li> <li>- device installation and configuration</li> <li>- maintenance, support, break/fix, firmware update, patch management, etc.</li> <li>- decommissioning</li> </ul>
4	<b>Platform Software Contracts (OUT OF SCOPE OF THIS ITQ)</b>	<p>SSC operates many software products as part of the existing IT infrastructure structure. At the infrastructure level, these products include operating systems, virtualization software, infrastructure middleware and systems management software.</p> <p>To respond to the current issues of complexity, SSC has already begun to consolidate the existing contracts for the same software products</p>

Category Name	Summary Description
	<p>from the original departments to single contracts with SSC.</p> <p>To meet its final end state IT infrastructure software requirements, SSC plans to rationalize, standardize and consolidate the software product lists, in alignment with its end state service offerings and service catalogue, to reduce and/or eliminate duplication of functionality.</p> <p><u>This activity will be conducted separately and is not in scope of this ITQ.</u></p>

### 5. Responsibility Matrix

This Responsibility Matrix identifies the responsible party (SSC or Vendor) for the ownership, ordering, installation and life cycle functions for each category.

	Category-1 SSI		Category-2 Virtual Server		Category-3 Cloud Management	
	SSC	Vendor	SSC	Vendor	SSC	Vendor
<b>Ownership</b>						
Infrastructure Hardware	X			X	X <sup>1</sup>	
Software Licenses and Virtual Server Instances	X		X <sup>2</sup>		X	
Data Assets	X		X		X	
Product Requirements	X		X		X	
Product Specifications		X		X		X
<b>Ordering</b>						
Infrastructure Hardware	X		X	X <sup>3</sup>	N/A	N/A
Software Licenses and Virtual Server Instances	X		X	X <sup>4</sup>	N/A	N/A
<b>Installation</b>						
Infrastructure Hardware		X		X	X	X <sup>5</sup>
Software Licenses and Virtual Server Instances		X		X	X	X <sup>6</sup>
Configuration of Software Licenses and Virtual Server Instances		X		X	X	X <sup>7</sup>
<b>Life Cycle</b>						
Provisioning	X			X	N/A	N/A
Capacity Planning	X			X	X	
Break/Fix		X		X		X
Maintenance		X		X		X
Decommissioning	X <sup>8</sup>	X <sup>9</sup>	X <sup>8</sup>	X <sup>9</sup>	X <sup>8</sup>	X <sup>9</sup>

Ownership	Ownership represents the "full Ownership of" physical resources such as server(s), ram, disk drives, storage controller(s). It also includes all licenses tied to the physical asset(s) which enables any feature or function of the physical resources.
Ownership Infrastructure Hardware	SSC will own all hardware for Category 1 and 3. The Vendor will own the hardware for Category 2.  <sup>1</sup> SSC will explore an option for the vendor to own the hardware in Category 3 during the Review and Refine Requirements Phase.
Ownership Software Licenses and Virtual Server Instances	SSC will own all software licenses for all Categories (Government Furnished Equipment).  <sup>2</sup> SSC will explore software licensing ownership models to meet Category 2 requirements during the Review and Refine Requirements Phase.

Ownership Data Assets	SSC will own all data assets at all times.
Ownership Product Requirements	SSC will own the Product Requirements for all categories.
Ownership Product Specifications	The vendor will own the Product Specifications for all categories, which must meet the Product Requirements.
Ordering	Ordering represents the functions of requesting products from the vendors.
Ordering Infrastructure Hardware	SSC will be responsible for the ordering of hardware for Category 1.  <sup>3</sup> In Category 2, SSC will order virtual servers and the vendor will be responsible for providing the hardware equipment capable of housing and operating the virtual servers, in accordance with the performance criteria stated in the resulting supply arrangements.
Ordering Software Licenses and Virtual Server Instances	SSC will own all software licenses for all Categories (Government Furnished Equipment), and if any additional licenses are required, SSC will be responsible for ordering those licenses.  <sup>4</sup> <i>SSC will explore software licensing ownership models to meet Category 2 requirements during the Review and Refine Requirements Phase, and if it becomes the case where the vendor owns software licences, processes may be established for the vendor to provide those licenses on an as required basis for SSC.</i>
Installation	Installation represents the functions of: <ul style="list-style-type: none"> <li>- installing the hardware equipment and software licenses on each device;</li> <li>- installing those devices in the SSC data centres;</li> <li>- connecting those devices to the SSC network; and</li> <li>- ensuring that the devices and network connectivity are fully functional.</li> </ul>
Installation Infrastructure Hardware	This function Includes: <ul style="list-style-type: none"> <li>- removal of equipment from shipping material</li> <li>- installation of equipment into data centre supplied or provider supplied racks is dependent on the requirements of the facility into which the equipment is installed</li> <li>- connection of cable infrastructure internal to provided solution</li> <li>- initial power up and component verification</li> </ul> <p>The Vendor is responsible for the installation of infrastructure hardware in categories 1 and 2. SSC will be responsible for the installation of infrastructure hardware in category 3.</p> <sup>5</sup> <i>SSC will explore an option for the vendor to install the hardware in Category 3 during the Review and Refine Requirements Phase.</i>
Installation Software Licenses and Virtual Server Instances	The Vendor is responsible for the installation of Software Licenses in categories 1 and 2. SSC will be responsible for the installation of infrastructure hardware in category 3.  <sup>6</sup> <i>SSC will explore an option for the vendor to install the Software Licenses in Category 3 during the Review and Refine Requirements Phase.</i>
Installation Configuration of Software Licenses and Virtual Server Instances	The Vendor is responsible for the configuration of Software Licenses in categories 1 and 2. SSC will be responsible for the configuration of Software Licenses in category 3.  <sup>7</sup> <i>SSC will explore an option for the vendor to configure the Software Licenses in Category 3 during the Review and Refine Requirements Phase.</i>
Life Cycle	The Life Cycle function represents those activities associated with provisioning, capacity planning, break/fix, maintenance, and decommissioning of the infrastructure hardware.
Life Cycle Provisioning	The function of provisioning identifies the party who will allocate infrastructure hardware and virtual server resources to meet individual partner requirements, such as storage capacity, x86 blade to hypervisor cluster, or CPU cores to a vCPU pool.  SSC will be responsible for provisioning in Category 1. The vendor will be responsible for provisioning in Category 2.

<p>Life Cycle Capacity Planning</p>	<p>The function of capacity planning represents the broad activities associated with forecasting the demand requirements of infrastructure hardware and virtual server resources over the short-to-long period, assessing the availability of existing infrastructure hardware and virtual server resources to meet the demand, and identifying the gap between available and needed resources.</p> <p>SSC will be responsible for capacity planning in Categories 1 and 3. The vendor will be responsible for capacity planning in Category 2, in concert with SSC for identifying the capacity requirements for virtual server capacity.</p>
<p>Life Cycle Break/Fix</p>	<p>Break/fix represents the activities associated with repairing or replacing of infrastructure hardware. On identification of a fault of the equipment, the responsible party shall replace the faulty component and complete configuration changes to return the equipment to full operational status. The responsible party will complete the fix in co-operation with the service operator to ensure no unplanned service outage occurs.</p> <p>The vendor is responsible for break/fix of infrastructure hardware for all categories.</p>
<p>Life Cycle Maintenance</p>	<p>Maintenance represents the installation of regular planned changes to infrastructure hardware and virtual server resources.</p> <p>The vendor is responsible for maintenance for all categories.</p>
<p>Life Cycle Decommissioning</p>	<p>Decommissioning represents the activities of removing an infrastructure hardware device(s) from a data centre due to planned end of life replacement requirement or faulty device.</p> <p>Decommissioning is a dual SSC-Vendor responsibility.</p> <p><sup>8</sup> SSC will be responsible for data destruction in all categories according to government policy. In the cases where the infrastructure hardware is owned by the vendor, the vendor <i>must</i> adhere to GC policy as it relates to the destruction and disposal of devices used to store data.</p> <p>SSC is responsible for ensuring that software licenses are appropriately identified for reuse in all categories.</p> <p>SSC is responsible for the disposal of the asset, where SSC owns the asset, and the vendor is responsible for the disposal of the asset, where the vendor owns the asset.</p> <p><sup>9</sup> <i>SSC will explore decommissioning service options during the Review and Refine Requirements Phase for the vendor to render various Life Cycle decommissioning services as deemed appropriate by SSC.</i></p>

## Annex C

### DEFINITION OF TERMS

Term	Definition
6 Main Geographical Regions	<p>The six geographical regions of Canada are:</p> <ul style="list-style-type: none"> <li>• Atlantic</li> <li>• Quebec</li> <li>• Ontario</li> <li>• Prairies</li> <li>• British Columbia</li> <li>• Territories</li> </ul>
Affiliate	For the purposes of this solicitation, Affiliate has the same meaning as “affiliated persons” under the <i>Canada Income Tax Act</i> .
Bid	An offer to provide services or supply goods as a result of a solicitation.
Bidder	A person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a contract for goods, services or both. It includes the parent, subsidiaries and other affiliates of the bidder.
Classified information	<p>This relates to the National Interest. It concerns the defence and maintenance of the social, political, and economic stability of Canada. There are three levels of Classified information:</p> <p>Top Secret: A very limited amount of compromised information could cause exceptionally grave injury to the National Interest.</p> <p>Secret: Compromise could cause serious injury to the National Interest.</p> <p>Confidential: Compromise could cause limited injury to the National Interest.</p>
Client Organization	An entity of users, from either a public or private sector organization, receiving services from DCSSI operated by the ITQ Response Lead or Core Team Members 2 and/or 3.
Collaborative Procurement Approach (CPA)	<p>A procurement methodology consisting of the following phases:</p> <ol style="list-style-type: none"> <li>(i) Industry Engagement Phase – to seek industry feedback on the project and procurement approach;</li> <li>(ii) ITQ Phase – to identify Qualified Respondents;</li> <li>(iii) Review and Refine Requirements Phase – Qualified Respondents collaborate with SSC to review and refine the business and technical requirements;</li> <li>(iv) Bid Solicitation Phase – Qualified Respondents are invited to submit technical and price proposals;</li> <li>(v) Contract Award Phase – issue contract(s) to winning Bidder(s); and</li> <li>(vi) Implementation Phase – design architecture, build and implementation of DCSSI and service delivery.</li> </ol>
Cloud Management Platform	The Cloud Management Platform provides a framework for the end-to-end ability to provision, configure, monitor, and report on infrastructure resources, platforms and applications in a multi-tenant, multi-datacentre environment. The Cloud Management Platform is hardware and platform independent and relies on industry standard north/southbound APIs to ensure vendor interoperability.

Term	Definition
Converged Infrastructure	<p>Converged Infrastructure is the name generally used to describe a pre-engineered set of servers, storage, networking and security systems that are integrated into shared pools of interoperable resources and managed through a common management and orchestration platform.</p> <p>For the purposes of this ITQ, SSC is specifically looking for the following:</p> <ul style="list-style-type: none"> <li>• The Converged Infrastructure must be marketed as a single product by an Original Equipment Manufacturers (OEM) or consortium, including documentation and support. Although the system can be sold as a single or multiple SKU solution, any system designed for another purpose, or consisting of a number of disparate components assembled together without providing a single point of management, and a single point of support for customers (e.g. single 1-800 number to place a service call) will not be considered;</li> <li>• The Converged Infrastructure must be fully operational and fully integrated, containing all major components, management software, and optional accessories when shipped. These include but are not limited to: <ul style="list-style-type: none"> <li>○ system enclosure and/or rack cabinet (where appropriate);</li> <li>○ computing systems;</li> <li>○ network/storage fabric switches;</li> <li>○ disk array controllers;</li> <li>○ disk drives;</li> <li>○ shelving units, power supplies and cooling systems necessary for the system; and</li> <li>○ any required service / systems management software or function required to integrate with an overall Enterprise service / systems management system.</li> </ul> </li> <li>• The Converged Infrastructure must be sized and deployed based on templates that allow for implementation and growth with a predefined approach; and</li> <li>• The Converged Infrastructure must include all vendor management and proprietary software and software or port licenses (for any of the included components), device drivers, and cabling required for the system.</li> </ul>
Core Team	A maximum of 3 firms (Core Team Members) that can join together to form a team and use their combined corporate experience to provide a Response. One firm, however, must identify itself as the ITQ Response Lead. (Pertains only to Categories 2 & 3 of this ITQ.)
Core Team Member	An entity that the Respondent is proposing, to perform any part of the work and whose experience is being used to meet the ITQ requirements.
DCSSI	Data Centre Server Storage Infrastructure
GC	Government of Canada
Government Furnished Equipment (GFE)	Government Furnished Equipment (GFE) is equipment that is owned by the government and delivered to, or made available to the suppliers.

Term	Definition
Invitation to Qualify (ITQ)	Procurement instrument used to identify Qualified Respondents for subsequent phases of the CPA.
ITQ Response Lead	The Respondent of a Core Team.
Joint Venture	Association of two or more parties who combine their money, property, knowledge, expertise or other resources in a single joint business enterprise, sometimes referred as a consortium, to bid together on a requirement.
Original Equipment Manufacturer (OEM)	The manufacturer of the hardware, as evidenced by the name appearing on the hardware and on accompanying documentation.
Partners	Departments and agencies for which SSC provides information technology (IT) services.
Platform	General purpose information systems components used to process and store electronic data, such as desktop computers, servers, network devices, and mobile devices. Platforms usually contain server hardware, storage hardware, utility hardware, software and operating systems.
Project Reference	A reference from a client of the Respondent regarding a project that was performed by the respondent for that client. Project References are used to address the mandatory requirements in Attachment 4.1: Mandatory Evaluation Criteria.
Protected Information	<p>Protected information refers to specific provisions of the <i>Access to Information Act</i> and the <i>Privacy Act</i> and applies to sensitive personal, private, and business information.</p> <p><b>Protected C:</b> Compromise of a very limited amount of information could result in <b>exceptionally grave injury</b>, such as loss of life.</p> <p><b>Protected B:</b> Compromise could result in <b>grave injury</b>, such as loss of reputation or competitive advantage.</p> <p><b>Protected A:</b> Compromise could result in <b>limited injury</b>.</p>
Qualified Respondent	A Respondent who has been evaluated as compliant with the requirement of the ITQ phase of the procurement.
Reference Architecture	<p>A Reference Architecture provides the template solution for an architecture for a particular domain. In the context of this ITQ, a Reference Architecture provides</p> <ul style="list-style-type: none"> <li>- the list of features and functions of the server and/or storage platforms;</li> <li>- the structures elements and relationship of the server and/or storage platforms;</li> <li>- the list of physical and digital interfaces, including their relationship with each other and with functions located outside of the scope of the server and/or storage platforms;</li> <li>- the high-level specifications of the server and/or storage platforms;</li> <li>- the list of standards to which the server and/or storage platforms must adhere</li> <li>- a common vocabulary.</li> </ul>
Respondent	A vendor who submits a Response to this ITQ.
Response	The Respondent's submission in response to this ITQ.



Term	Definition
SSC	Shared Services Canada
Stand Alone Server	A stand alone server is used to operate a single instance of an operating system.
Storage	<p>For the purpose of this ITQ, Storage at minimum refers to</p> <ul style="list-style-type: none"> <li>• Storage Attached Networks (SAN), including the storage subsystem and network components</li> <li>• Network Attached Storage (NAS), including capacity and appliance to provide at minimum NFS and CIFS based services</li> <li>• Systems for storage subsystem virtualization</li> <li>• Appliances for the purpose of backup, archiving, and object storage services</li> <li>• Virtual Tape Libraries and tape Robotic Systems</li> </ul>
System	A generic term used to mean network and other devices, operating systems, computing platforms, virtualization software and applications or any combination thereof. Its use is context specific.
Unix Servers	A UNIX server is a server that conforms to the latest IEEE/Open group POSIX.1 standard (IEEE Std 1003.1, 2013 Edition). The chipset architecture can include SPARC/PA-RISC/Power.
Virtual Servers	An individual instance of an operating system, where the underlying compute, storage, and network infrastructure is owned and managed by the supplier.
x86 Servers	A X86 server that runs applications and instructions set that is compatible with the 8086 CPU. The chipset architecture includes 16 Bit, 32 Bit and 64 Bit.



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

**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	Shared Services Canada (SSC)	2. Branch or Directorate / Direction générale ou Direction	TSSD-DCC
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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 Data Center Server Storage Infrastructure (DC SSI) procurement initiative will serve to establish contracting vehicles to support the Data Center Consolidation Program (DCCP) in the development and operation of Shared Service Canada (SSC) end-state data centers and includes the procurement of a Control Plane, Data Protection Management System (DPMS) and Server & Storage Infrastructure.

5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées?  No / Non  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?  No / Non  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)  No / Non  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.  No / Non  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?  No / Non  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 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 type="checkbox"/> RELIABILITY STATUS<br>COTE DE FIABILITÉ    | <input type="checkbox"/> CONFIDENTIAL<br>CONFIDENTIEL           | <input checked="" type="checkbox"/> SECRET<br>SECRET | <input type="checkbox"/> TOP SECRET<br>TRÈS SECRET               |
| <input type="checkbox"/> TOP SECRET- SIGINT<br>TRÈS SECRET - SIGINT | <input type="checkbox"/> NATO CONFIDENTIAL<br>NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET<br>NATO SECRET  | <input type="checkbox"/> COSMIC TOP SECRET<br>COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS<br>ACCÈS AUX EMBLEMES          |   |  |  |
- 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



Contract Number / Numéro du contrat
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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	SECRET	TOP SECRET	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÉS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET
				CONFIDENTIEL		TRÉS SECRET	NATO DIFFUSION RESTREINTE	NATO CONFIDENTIEL			A	B	C	CONFIDENTIEL		TRÉS SECRET
Information / Assets Renseignements / Biens Production		X			X											
IT Media / Support TI IT Link / Lien électronique																

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).**

## Attachment 4.1: Mandatory Evaluation Criteria

<b>Attachment 4.1.1 – Category 1- Server and Storage Infrastructure Mandatory Evaluation Criteria</b>
<b>Mandatory Experience Requirement M01</b>
<p>The Respondent must have manufactured, marketed, supplied, tested, implemented and maintained at least two of the infrastructures listed below as defined in Annex C – Definition of Terms. The Respondent must demonstrate that this experience occurred prior to the posting date of this ITQ, for 5 Customers, each with 5,000+ employees and two or more data centres consuming a minimum of 100 KVA to operate the following specified infrastructure :</p> <ul style="list-style-type: none"><li>(a) Converged Infrastructure</li><li>(b) Standalone Servers</li><li>(c) Storage</li></ul> <p>Of these 5 Customers, at least 3 must be located in Canada, and 3 must be from the public sector.</p>
<b>Mandatory Experience Requirement M02</b>
<p>The Respondent must have supplied server or storage infrastructure that has been marketed, integrated, tested maintained and supported as part of a Converged Infrastructure and/or Reference Architecture as defined in Annex C – Definition of terms. The Respondent must demonstrate how their infrastructure was deployed and connected to 10+ customer network(s) for at least 10 of these Converged/Reference Infrastructures in the past 3 years prior to the posting date of this ITQ.</p>
<b>Mandatory Experience Requirement M03</b>
<p>The Respondent must demonstrate experience as a primary Contractor with a public sector customer for one of the referenced customers in M01 and one of the referenced customers in M02.</p>
<b>Mandatory Experience Requirement M04</b>
<p>The Respondent must have provided bilingual (French and English) help desk support using a dedicated toll free number to an organization with a minimum of 5,000 employees where the Respondent provided that help desk support on a nationwide presence across Canada as defined in Annex C – Definition of Terms.</p> <p>The Respondent must also have provided continuous onsite support on a 24 hours per day, 7 days per week and 365 days per year basis with a 2 hour or better response time in 4 of the 6 Main Geographical Regions across Canada as defined in Annex C – Definition of Terms for server and/or storage infrastructure.</p>
<b>Mandatory Experience Requirement M05</b>
<p>The Respondent must have supplied server and/or storage infrastructure as part of a Converged Infrastructure and/or Reference Architecture on which the following software was installed and configured for at least 3 customers:</p> <ul style="list-style-type: none"><li>a) Operating Systems: 1) Windows and Linux and/or 2) Unix;</li><li>b) Hypervisors: such as VMware and Hyper-V;</li><li>c) Other software, such as systems management tools, database management software, and/or development frameworks (Java, .net, etc.)</li></ul> <p>Of these 3 Customers, at least 2 must be located in Canada and be public sector, and all must have 5,000+ employees.</p>

<b>Attachment 4.1.1 – Category 1: Server and Storage Infrastructure Mandatory Evaluation Criteria Checklist</b>	
<b>Customer # _____</b>	
<b>Respondent name</b>	
<b>Customer name</b>	
<b>Timeframe</b>	
<b>Infrastructure</b>	<input type="checkbox"/> Converged Infrastructure <input type="checkbox"/> Standalone Servers <input type="checkbox"/> Storage <input type="checkbox"/> Other: _____
<b>Infrastructure location</b>	<input type="checkbox"/> Customer Premises <input type="checkbox"/> Respondent Premises
<b>Customer`s approximate number of employees</b>	
<b>Number of data centres</b>	
<b>Approximate monthly KVA usage per data centre</b>	
<b>Data centre location</b>	<input type="checkbox"/> Canada <input type="checkbox"/> Other: _____
<b>Public sector customer</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Marketed, integrated, tested, maintained and supported converged/referenced infrastructure</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Number of customer networks to which the Respondent deployed and connected its infrastructure</b>	
<b>Previous experience as primary Contractor with public sector Customer</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Language of support</b>	<input type="checkbox"/> French <input type="checkbox"/> English <input type="checkbox"/> Other: _____
<b>Bilingual toll free number</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Number of users</b>	
<b>Nationwide presence</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Type of support</b>	<input type="checkbox"/> Onsite <input type="checkbox"/> Other: _____
<b>Hours of support</b>	<input type="checkbox"/> 24/7 <input type="checkbox"/> Other: _____
<b>Response time</b>	
<b>Software installed and configured on server and/or storage infrastructure as part of a Converged Infrastructure and/or Reference Architecture</b>	<input type="checkbox"/> None <input type="checkbox"/> Windows OS <input type="checkbox"/> Linux OS <input type="checkbox"/> Unix OS <input type="checkbox"/> VMware <input type="checkbox"/> Hyper-V <input type="checkbox"/> Systems management tools <input type="checkbox"/> Database management tools

	<input type="checkbox"/> Development frameworks <input type="checkbox"/> Other: _____
<b>Comments, additional substantiation or details</b>	

<b>Attachment 4.1.2 – Category 2: Virtual Servers Mandatory Evaluations Criteria</b>
<b>Mandatory Experience Requirement M01</b>
The Respondent must demonstrate its and /or its Core Team Member's experience by providing examples of projects where it is currently hosting 25,000 concurrent active Virtual Servers, as defined in Annex C – Definition of Terms.
<b>Mandatory Experience Requirement M02</b>
The Respondent must demonstrate how it and/or its Core Team members build, deploy and operate 5,000+ Virtual Servers for each of 3 individual customers, where each customer has 5,000+ employees. The Respondent must describe in sufficient detail the extent of its or its Core Team Member's overall corporate experience in the supply and servicing of these servers, including maintenance and break/fix, operating 24 hours per day, 7 days per week, 365 days per year with a 4 hour or better response time, over the past 2 years.
<b>Mandatory Experience Requirement M03</b>
The Respondent must demonstrate its and/or its Core Team Member's experience as a primary Contractor with a public sector customer within the past 3 years for one of the customers referenced in M02 for the supply of 100+ of their Virtual Servers using capacity on demand.



<b>Attachment 4.1.2 – Category 2: Virtual Servers Mandatory Evaluation Criteria Checklist</b>	
<b>Customer # _____</b>	
<b>Respondent and/or Core Team Member name</b>	
<b>Customer name</b>	
<b>Timeframe</b>	
<b>Number of hosted concurrent active Virtual Servers</b>	
<b>Number of Virtual Servers built, deployed, and operated per Customer</b>	
<b>Customer`s approximate number of employees</b>	
<b>Supplied and serviced the servers, including maintenance and break fix</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Hours of support</b>	<input type="checkbox"/> 24/7 <input type="checkbox"/> Other: _____
<b>Response time</b>	
<b>Previous experience as a primary Contractor with public sector Customer</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Capacity on demand</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Comments, additional substantiation or details</b>	

<b>Attachment 4.1.3 – Category 3: Cloud Management Platform Mandatory Evaluations Criteria</b>
<b>Mandatory Experience Requirement M01</b>
The Respondent and/or its Core Team Member(s) must demonstrate 10 Customer deployments of functioning Cloud Management Platforms as defined in Annex C – Definition of Terms, in the past 3 years prior to the closing date of this ITQ based on Category 1 defined infrastructure as described in this ITQ.
<b>Mandatory Experience Requirement M02</b>
The Respondent and/or its Core Team Member(s) must have designed and deployed a Cloud Management Platform which was comprised of at least six (6) of the following functions on customer premises for 3 of the above mentioned platforms referenced in M01. <ul style="list-style-type: none"><li>- self-service portal</li><li>- service catalogue</li><li>- chargeback/show back</li><li>- capacity management</li><li>- performance management</li><li>- configuration and change management</li><li>- life cycle management</li><li>- orchestration</li><li>- external cloud connector</li></ul>
<b>Mandatory Experience Requirement M03</b>
The Respondent must demonstrate that it and/or its Core Team Member(s) possess experience as a primary Contractor with a public sector Customer within the past 3 years for the supply of their Cloud Management Platform for one of the Customers referenced in M02.
<b>Mandatory Experience Requirement M04</b>
The Respondent and/or its Core Team Member(s) must have continuously provided onsite support, including maintenance and break fix, operating 24 hours per day, 7 days per week, 365 days per year with a 4 hour or better response time, dedicated bilingual toll-free support, over the past 2 years. This support must have been provided to at least one organization with a minimum of 5,000 employees with a nationwide presence in at least 4 of the 6 main geographical regions across Canada as defined in Annex C – Definition of Terms.
<b>Mandatory Experience Requirement M05</b>
The Respondent and/or its Core Team Member(s) must have successfully installed, connected, and tested the Cloud Management Platform to the customer network(s) for a minimum of 3 Customers with 5,000+ employees with two or more customer data centres consuming a minimum of 100KVA daily for each data centre and the Cloud Management Platform must still be in use by the customer as of the posting date of this ITQ.

<b>Attachment 4.1.3 – Category 3: Cloud Management Platform Mandatory Evaluation Criteria Checklist</b>	
<b>Customer # _____</b>	
<b>Respondent and/or Core Team Member Name</b>	
<b>Customer Name</b>	
<b>Timeframe</b>	
<b>Number of Customer deployed Cloud Management Platform based on Category 1 infrastructure</b>	
<b>Cloud Management Platform functions</b>	<input type="checkbox"/> Self-Service Portal <input type="checkbox"/> Service Catalogue <input type="checkbox"/> Chargeback/Show Back <input type="checkbox"/> Capacity Management <input type="checkbox"/> Performance Management <input type="checkbox"/> Configuration and Change Management <input type="checkbox"/> Life Cycle Management <input type="checkbox"/> Orchestration <input type="checkbox"/> External Cloud Connector <input type="checkbox"/> Other: _____
<b>Previous Experience as a Primary Contractor with Public Sector customer</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Customer`s approximate number of employees</b>	
<b>Nationwide presence</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Hours of Support</b>	<input type="checkbox"/> 24/7 <input type="checkbox"/> Other: _____
<b>Language of Support</b>	<input type="checkbox"/> French <input type="checkbox"/> English <input type="checkbox"/> Other: _____
<b>Type of Support</b>	<input type="checkbox"/> Onsite <input type="checkbox"/> Other: _____
<b>Response Time</b>	
<b>Installation, connection and testing of Cloud Management Platform to the customer network</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Number of Data Centres</b>	
<b>Approximate monthly KvA usage per data centre</b>	
<b>Comments, additional substantiation or details</b>	

Form 1

ITQ SUBMISSION FORM

<b>ITQ SUBMISSION FORM</b> <b>CATEGORY 1 <input type="checkbox"/> CATEGORY 2 <input type="checkbox"/> CATEGORY 3 <input type="checkbox"/></b>	
<b>Respondent full legal name</b> <i>[Note to Suppliers: Suppliers who are part of a responding group should take care to identify the correct corporation as the Respondent.]</i>	
<b>Authorized Representative of Respondent for evaluation purposes (e.g. clarifications)</b>	Name: Title: Address: Telephone #: Email:
<b>Respondent's Procurement Business Number (PBN)</b> <i>[see the Standard Instructions 2003]</i> <i>[Note to Respondents: Please ensure that the PBN you provide matches the legal name under which you have submitted your response. If it does not, the Respondent will be determined based on the legal name provided, not based on the PBN, and the Respondent will be required to submit the PBN that matches the legal name of the Respondent.]</i>	Procurement Business Number:
<b>Canada's Official Language in which the Respondent will communicate with Canada during any subsequent process - indicate either English or French</b>	English _____ French _____
<b>Former Public Servants</b>  See Part 7 of the ITQ entitled Former Public Servant Certification for a definition of "Former Public Servant".  This requirement applies to the Respondent. In the case of a joint venture Respondent, the requirement applies to each member of the joint venture.	Is the Respondent in receipt of a pension as defined in this solicitation? Yes ____ No ____  If yes, please provide the information required by the Article in section 7.2 entitled "Former Public Servant Certification".  Is the Respondent a FPS who received a lump sum payment under the terms of a work force reduction program? Yes ____ No ____  If yes, please provide the information required by the Article in section 7.2 entitled "Former Public Servant Certification".
<b>Applicable Laws:</b> Respondent are requested to indicate the Canadian province or territory they wish to apply for applicable laws, as indicated in Part 3	
<b>Respondent's Proposed Site or Premises Requiring Safeguard Measures <i>[Delete if not applicable]</i></b>	Address: Street Number / Street Name /, Unit / Suite / Apartment number City, Province, Territory / State Postal Code / Zip Code Country

<b>ITQ SUBMISSION FORM</b> <b>CATEGORY 1 <input type="checkbox"/> CATEGORY 2 <input type="checkbox"/> CATEGORY 3 <input type="checkbox"/></b>											
<b>Security Clearance Level of Respondent</b> <i>[include both the level and the date it was granted]</i> <b>[Note to suppliers: Please ensure that the security clearance matches the legal name of the Respondent. If it does not, the security clearance is not valid for the Respondent.]</b>											
<b>CORE TEAM MEMBERS (IF APPLICABLE)</b> <b>(REPEAT AS REQUIRED)</b>											
<b>Core Team Member's full legal name</b>											
<b>Relationship to Respondent for the purpose of ITQ</b>											
<b>Original Equipment Manufacturer (Y/N)</b>											
<b>Core Team Member used to meet ITQ Criteria (Y/N)</b>											
<b>Core Team Member's full legal name</b>											
<b>Relationship to Respondent for the purpose of ITQ</b>											
<b>Original Equipment Manufacturer (Y/N)</b>											
<b>Core Team Member used to meet ITQ Criteria (Y/N)</b>											
As the authorized representative of the Respondent, by signing below, I confirm that I have read and understood the entire ITQ including the documents incorporated by reference into the ITQ and the entire Response, and I certify that: 1. The Respondent meets all the mandatory requirements described in the ITQ; and 2. All the information provided in the ITQ Response is complete, true and accurate.											
<b>Signature of the authorized representative of the Respondent</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 50%; padding: 2px;">Name</td><td></td></tr> <tr><td style="padding: 2px;">Address</td><td></td></tr> <tr><td style="padding: 2px;">Email</td><td></td></tr> <tr><td style="padding: 2px;">Signature</td><td></td></tr> <tr><td style="padding: 2px;">Phone</td><td></td></tr> </table>	Name		Address		Email		Signature		Phone	
Name											
Address											
Email											
Signature											
Phone											

## Form 2

### FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - CERTIFICATION

I, the Respondent, 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 response or bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the response or bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Respondent's certifications. Failure to comply with such request by Canada will also render the response or bid non-responsive or will constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit [ESDC-Labour's website](#).

Date: \_\_\_\_\_ (YYYY/MM/DD) (If left blank, the date will be deemed to be the ITQ closing date.)

Complete both A and B.

A. Check only one of the following:

- A1. The Respondent certifies having no work force in Canada.
  - A2. The Respondent certifies being a public sector employer.
  - A3. The Respondent certifies being a [federally regulated employer](#) being subject to the [Employment Equity Act](#).
  - A4. The Respondent 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 Respondent has a combined workforce in Canada of 100 or more employees; and
    - A5.1. The Respondent certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.
- OR**
- A5.2. The Respondent certifies having submitted the [Agreement to Implement Employment Equity \(LAB1168\)](#) to HRSDC-Labour. As this is a condition to the award of a contract resulting from any subsequent bid solicitation, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

- B1. The Respondent is not a Joint Venture.

**OR**

- B2. The Respondent 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)

**Form 3**

**OEM CERTIFICATION FORM**

This confirms that the original equipment manufacturer (OEM) identified below has authorized the Respondent named below to provide and maintain its products under any contract resulting from a bid solicitation issued as a result of the ITQ identified below.

Name of OEM	_____
Signature of authorized signatory of OEM	_____
Print Name of authorized signatory of OEM	_____
Print Title of authorized signatory of OEM	_____
Address for authorized signatory of OEM	_____
Telephone no. for authorized signatory of OEM	_____
Fax no. for authorized signatory of OEM	_____
Date signed	_____
ITQ Number	_____
Name of Respondent	_____

**Form 4**

**PRICING COMMITMENT**

In consideration of the opportunity to participate in the Data Centre Server and Storage Infrastructure procurement process, including the collaborative Review and Refine Requirements Phase, the Respondent identified below agrees on its own behalf and on behalf of its affiliates that they will, after bid closing for any subsequent bid solicitation that forms part of this procurement process, apply the prices proposed in response to that bid solicitation to any existing contracts and standing offers it has with Shared Services Canada (including those contracts that it entered into with Public Works and Government Services Canada, but that now fall within the mandate of SSC) (collectively called the **“Existing Instruments”**). This commitment:

- (a) applies only to those prices bid in response to the bid solicitation that are lower than the prices in the Existing Instruments for similar goods and/or services available for purchase under the Existing Instruments;
- (b) includes Existing Instruments that may have been signed by a reseller acting as agent for the Respondent or any of its affiliates;
- (c) takes effect upon bid closing for the bid solicitation;
- (d) applies regardless of whether or not the Qualified Respondent bidding on the bid solicitation is awarded the resulting contract or other instrument; and
- (e) takes effect without any further amendment to the Existing Instruments – all affected Existing Instruments are deemed to be amended on the date of bid closing and any additional “amendment” issued by SSC is purely for administrative purposes.

The Respondent warrants and represents that it has sought and obtained all necessary authority to make these commitments on its own behalf and on behalf of its affiliates (affiliates has the same meaning as “affiliated persons” under the *Canada Income Tax Act*).

\_\_\_\_\_ (the “Respondent”) [insert name of Respondent]  
by its Authorized Signatory(ies)

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Print Name: \_\_\_\_\_