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| <p>RETURN BIDS TO: RETOURNER LES SOUMISSIONS À:</p> <p>Bid Receiving - Environment Canada / Réception des soumissions – Environnement Canada <i>Reg.Landry@canada.ca</i></p> <p>BID SOLICITATION DEMANDE DE SOUMISSIONS</p> <p>PROPOSAL TO: ENVIRONMENT CANADA</p> <p>We offer to perform or provide to Canada the services detailed in the document including any attachments and annexes, in accordance with the terms and conditions set out or referred to in the document, at the price(s) provided.</p> <p>SOUSSION À: ENVIRONNEMENT CANADA</p> <p>Nous offrons d'effectuer ou de fournir au Canada, aux conditions énoncées ou incluses par référence dans le document incluant toutes pièces jointes et annexes, les services détaillés dans le document, au(x) prix indiqué(s).</p> | <p>Title – Titre Analysis of Auto Manufacturing Marketing and Strategies</p> | | |
| | <p>EC Bid Solicitation No. /SAP No. – N° de la demande de soumissions EC / N° SAP 5000031994</p> | | |
| | <p>Date of Bid solicitation (YYYY-MM-DD) – Date de la demande de soumissions (AAAA-MM-JJ) 2017-08-04</p> | | |
| | <p>Bid Solicitation Closes (YEAR-MM-DD) - La demande de soumissions prend fin (AAAA-MM-JJ) 2017-08-25 at – à 2:00 P.M. on – le</p> | <p>Time Zone – Fuseau horaire <i>EDT</i></p> | |
| | <p>F.O.B – F.A.B</p> | | |
| | <p>Address Enquiries to - Adresser toutes questions à Reg Landry</p> | | |
| | <p>Telephone No. – N° de téléphone 819 938 3064</p> | <p>Fax No. – N° de Fax</p> | |
| | <p>Delivery Required (YEAR-MM-DD) – Livraison exigée (AAAA-MM-JJ) 31 March 2018</p> | | |
| | <p>Destination of Services / Destination des services</p> <p>Robert Simpson GHG Transportation Division 351 St. Joseph Blvdm, PVM 13th floor Gatineau, QC K1A 0H3</p> | | |
| | <p>Security / Sécurité <i>There is no security requirement.</i></p> | | |
| <p>Vendor/Firm Name and Address - Raison sociale et adresse du fournisseur/de l'entrepreneur</p> | | | |
| <p>Telephone No. – N° de téléphone</p> | <p>Fax No. – N° de Fax</p> | | |
| <p>Name and title of person authorized to sign on behalf of Vendor/Firm: (type or print) / Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie)</p> | | | |
| <p>Signature</p> | <p>Date</p> | | |

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PART 1 - GENERAL INFORMATION

1. Introduction

The bid solicitation is divided into seven parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications: includes the certifications to be provided;
- Part 6 Security and Other Requirements: includes specific requirements that must be addressed by bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Attachments include Mandatory Technical Criteria And Point Rated Technical Criteria

The Annexes include the Statement of Work, the Basis of Payment, the Schedule of Milestones, and any other annexes.

2. Summary

- 2.1 Environment Canada has a requirement as detailed in the Statement of Work, Annex A to the bid solicitation. The period of the contract is from contract award to 31 March 2018.
- 2.2 There is no security requirement associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, bidders should refer to the Canadian Industrial Security Directorate (CISD), Industrial Security Program of Public Works and Government Services Canada website (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>).
- 2.3 Bidders must provide a list of names, or other related information as needed, pursuant to section 01 Integrity Provisions of Standard Instructions 2003 (2017-04-27).
- 2.4 For services requirements, bidders in receipt of a pension or a lump sum payment must provide the required information as detailed in article 3 of Part 2 of the bid solicitation.
- 2.5 The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), and the Agreement on Internal Trade (AIT).

3. Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days of receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

PART 2 - BIDDER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the PWGSC *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The 2003 (2017-04-27) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

The standard instructions 2003 are modified as follows:

Under "Text" at 02:

Delete: "Procurement Business Number"

Insert: "Deleted"

At Section 02 Procurement Business Number

Delete: In its entirety

Insert: "Deleted"

At Section 05 Submission of Bids, Subsection 05 (2d):

Delete: In its entirety

Insert: "send its bid only to Environment Canada (EC) as specified on page 1 of the bid solicitation or to the address specified in the bid solicitation,"

At Section 06 Late Bids:

Delete: "PWGSC"

Insert: "Environment Canada"

At Section 07 Delayed Bids:

Delete: "PWGSC"

Insert: "Environment Canada"

At Section 08 Transmission by Facsimile, Subsection 08 (1):

Delete: In its entirety

Insert: "Bids may be submitted by facsimile if specified in the bid solicitation."

At Section 12 Rejection of Bid, Subsection 12 (1) a. and b.:

Delete: In their entirety

Insert: "Deleted"

At Section 17 Joint Venture, Subsection 17 (1) b.:

Delete: "the Procurement Business Number of each member of the joint venture,"

Insert: "Deleted"

At Section 20 Further Information, Subsection 20 (2):

Delete: In its entirety

Insert: "Deleted"

2. Submission of Bids

Bids must be submitted to Environment Canada (EC) at the address and by the date, time and place indicated on page 1 of the bid solicitation.

2.1 Deleted

3. Former Public Servant – Competitive Bid

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 awarded to FPS, bidders 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 of bids is completed, Canada will inform the Bidder 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 bid non-responsive.

Definitions

For the purposes of this clause, "former public servant" is any former member of a department as defined in the *Financial Administration Act*, R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

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

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the *Public Service Superannuation Act* (PSSA), R.S., 1985, c.P-36, and any increases paid pursuant to the *Supplementary Retirement Benefits Act*, R.S., 1985, c.S-24 as it affects the PSSA. It does not include pensions payable pursuant to the *Canadian Forces Superannuation Act*, R.S., 1985, c.C-17, the *Defence Services Pension Continuation Act*, 1970, c.D-3, the *Royal Canadian Mounted Police Pension Continuation Act*, 1970, c.R-10, and the *Royal Canadian Mounted Police Superannuation Act*, R.S., 1985, c.R-11, the *Members of Parliament Retiring Allowances Act*, R.S., 1985, c.M-5, and that portion of pension payable to the *Canada Pension Plan Act*, R.S., 1985, c.C-8.

Former Public Servant in Receipt of a Pension

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

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

- a. name of former public servant;

- b. date of termination of employment or retirement from the Public Service.

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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

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

4. Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than **5** calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all bidders. Enquiries not submitted in a form that can be distributed to all bidders may not be answered by Canada.

5. Applicable Laws

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

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory

specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the bidders.

6. Basis for Canada's Ownership of Intellectual Property

Environment Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following grounds:

- (6.4.1) the main purpose of the contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination;

PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

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

Section I: Technical Bid 1 electronic copy in PDF format

Section II: Financial Bid 1 electronic copy in PDF format

Section III: Certifications 1 electronic copy in PDF format

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

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

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

Section I: Technical Bid

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

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

Part 4, Evaluation Procedures, contains additional instructions that bidders should consider when preparing their technical bid.

Section II: Financial Bid

1.1 Bidders must submit their financial bid in accordance with the "Basis of Payment at Annex B . The total amount of Applicable Taxes must be shown separately.

1.2 Deleted

1.3 Deleted

1.4 Price Breakdown

In their financial bid, the bidders are requested to provide a detailed breakdown of the price for the following elements of the Work, as applicable:

- (a) Professional fees: For each individual and (or) labour category to be assigned to the Work, the bidders should indicate: i) the firm hourly rate or the firm daily rate, inclusive of overhead and profit; and ii) the estimated number of hours or days, as applicable. The bidders should indicate the number of hours in one working day.
- (b) Equipment (if applicable): The bidders should specify each item required to complete the Work

and provide the pricing basis of each one, Canadian customs duty and excise taxes included, as applicable. These items will be deliverable to Canada upon completion of the contract.

- (c) **Materials and Supplies (if applicable):** The bidders should identify each category of materials and supplies required to complete the Work and provide the pricing basis. The Bidder should indicate, on a per category basis, whether the items are likely to be consumed during the performance of any resulting contract.
- (d) **Travel and Living Expenses (if applicable):** The bidders should indicate the number of trips and the number of days for each trip, the cost, destination and purpose of each journey, together with the basis of these costs without exceeding the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the *National Joint Council Travel Directive* and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".
- (e) **Subcontracts (if applicable):** The bidders should identify all of the proposed subcontractors and provide in their financial bid for each one a price breakdown.
- (f) **Other Direct Charges (if applicable):** The bidders should identify all of the categories of other direct charges anticipated, such as long distance communications and rentals, providing the pricing basis for each and explaining the relevance to the work described in Part 7 of the bid solicitation.
- (g) **Applicable Taxes:** The bidders should indicate the Applicable Taxes separately.

1.5 Bidders should include the following information in their financial bid:

- (a) Their legal name; and
- (b) The name of the contact person (including this person's mailing address, phone and facsimile numbers and email address) authorized by the Bidder to enter into communications with Canada with regards to their bid; and any contract that may result from their bid.

Section III: Certifications

Bidders must submit the certifications required under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

1.1 Technical Evaluation

Except where expressly provided otherwise, the experience described in the bid must be the experience of the Bidder itself (which includes the experience of any companies that formed the Bidder by way of a merger but does not include any experience acquired through a purchase of assets or an assignment of contract). The experience of the Bidder's affiliates (i.e. parent, subsidiary or sister corporations), subcontractors, or suppliers will not be considered.

1.1 Technical Evaluation

Mandatory and point rated technical evaluation criteria are included in Attachment 1 to Part 4.

1.2 Financial Evaluation

1.2.1 Mandatory Financial Criteria

There is a Mandatory Financial criteria for this requirement.

1.2.2 Evaluation of Price

For evaluation purposes only, the price of the bid will be determined as follows:

- 1.2.1** The volumetric data included in the Financial Bid Presentation Sheet detailed in Attachment 1 to Part 3 are provided for bid evaluated price determination purposes only. They are not to be considered as a contract guarantee.”
- 1.2.2** For bid evaluation and contractor(s) selection purposes only, the evaluated price of a bid will be determined in accordance Annex B – Basis of Payment.

2. Basis of Selection (highest technical merit with the evaluated price)

Proposal Selection

Proposals will be evaluated in accordance with the requirements listed below. Proposals that do not obtain a minimum score of 70% will be rejected. Proposals will be evaluated on both technical and cost considerations. The contract will be awarded to the firm with the best proposal (i.e. highest overall score).

For a proposal to be deemed technically compliant, a bid must:

- a)** comply with all the requirements of the bid solicitation;
- b)** meet all of the mandatory criteria;
- c)** obtain the required minimum in **EACH** of the Technical Evaluation Criteria which are subject to point rating.

Bids not meeting **a) or b) or c)** will be declared non responsive. The responsive bid with the highest number of points will be recommended for award of a contract, provided that the total evaluated price does not exceed the budget available for this requirement. The bid proposal having obtained the highest combined score (70%) and best price (30%), will be recommended for award of a contract.

See the example below. The contractor selection method based on the proposal having obtained the largest number of total points.

Example:

Technical/Financial components

Equation 1:

$$\text{Total Points} = \frac{\text{Bidder's Rated Score}}{\text{Highest Bidder's Rated Score}} \times 70 + \frac{\text{Lowest Bidder's Price}}{\text{Bidder's Price}} \times 30$$

| Bidder | Bidder's Rated Score | Bidder's Price | Points for Technical/ Management Components | Points for Price | Total Points |
|----------|----------------------|----------------|---|---|----------------------|
| Bidder A | 80 | \$30,000 | $(80 \div 90) \times 70 = 71.1$ | $(30,000 \div 30,000) \times 30 = 20$ | $71.1 + 20 = 91.1$ |
| Bidder B | 85 | \$40,000 | $(85 \div 90) \times 70 = 75.6$ | $(30,000 \div 40,000) \times 30 = 15$ | $75.6 + 15 = 90.6$ |
| Bidder C | 90 | \$35,000 | $(90 \div 90) \times 70 = 80$ | $(30,000 \div 35,000) \times 30 = 17.1$ | $80 + 17.1 = 97.1^*$ |

Example:

***In this example, Bidder C will be recommended for award of the contract.**

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ATTACHMENT 1 TO PART 4

MANDATORY TECHNICAL CRITERIA AND POINT RATED TECHNICAL CRITERIA

9.1.2 Evaluation of the proposal

Each proposal meeting the mandatory requirements will be evaluated and rated according to the criteria described below and to the weighting described in **Error! Reference source not found..** Any relevant information to enable Environment and Climate Change Canada to adequately score the proposal based on the criteria listed below must be included. Information not included in the proposal will not be taken into consideration.

Table 1: Mandatory Criteria

| Mandatory Requirements (MR) | Description | Met/Not Met |
|------------------------------------|--|--------------------|
| MR 1 | The Expert Analyst must have experience and skills in vehicle related market research projects. | |
| MR 2 | The proposal must demonstrate team members have participated in studies of Canadian automotive sector and marketing. | |
| | | |
| Mandatory Financial (MF) | | Met/Not Met |
| MF 1 | Environment Canada has established a funding level of \$75,000 excluding taxes. | |

This section details the criteria that will be employed for evaluating proposals from bidders. Proposals must address each of the evaluation criteria and in sufficient detail to allow evaluation of each criterion. Proposals will be evaluated and scored in accordance with the criteria below (See Scoring Grid at the end of this section).

EVALUATION RATED CRITERIA

TECHNICAL PROPOSAL (50 POINTS)

Understanding of Requirements (10 points)

Proposals should clearly illustrate an understanding of the scope and objectives of the project.

- a) The bidder must demonstrate, through a written narrative, knowledge of issues related to the various data sources available and needed for the completion of the study. (5 pts)
- b) The written narrative must further demonstrate that the bidder has a clear idea of the requirement and the scope and objectives of the study. (5 pts)

Approach, Methodology and Work Plan (30 points)

Proposals should outline the comprehensive approach and specific tasks and steps proposed to complete all aspects of the study. Sufficient detail should be provided to allow for a complete understanding of the bidder's approach to the work and characteristics of the deliverables. This must include:

a) Approach Methodology

- Soundness and completeness of the methodology (6 pts)
- Original or innovative ideas (4 pts)
- Advantages of the proposed approach over alternatives (4 pts)
- A description of expected outputs (5 pts)

b) Work Plan - must demonstrate the feasibility of their proposed work plan including the organization of work tasks, and ensuring reliable and accessible data sources, within the timeframe set out in the Terms of Reference. Bidders must ensure that the number of personnel assigned to the project team is sufficient to meet the timeline for the project. A breakdown of the estimated time that each of the proposed personnel will devote to the different tasks must be included.

- Logical organization of tasks to be completed and their scheduling (5 pts)
- Details on team composition, the responsibilities and expected efforts by team member (6 pts)

Recognition of possible problems, proposed solutions, and additional suggestions (10 points)

Points are awarded for the recognition of any potential problems (2 pts) and for solutions to the identified potential problems (3 pts). Proposals should indicate if certain information is not accessible to the bidder and why. Points are also awarded for additional suggestions that could improve the work. (5 pts)

QUALIFICATIONS AND EXPERIENCE (50 POINTS)

Expert Analyst (15 points)

In their proposal, the bidder must detail the expert analyst experience and qualifications to be the team lead for this project. Points are awarded for years of experience as a expert analyst (3 pts), for vehicle related market research projects (8 pts) and skills to effectively execute and manage this project (4 pts).

Project Team Members (10 points)

The bidder must demonstrate the experience of each individual team member in working on previous projects of a similar or related scope and nature, in either the public or private sectors. Each member of the bidder’s proposed team must indicate a commitment of his or her availability throughout the duration of the project. Points are awarded for past projects the team members have participated in related to the studies of Canadian automotive sector and marketing (4 pts), relevant skills to effectively execute this project (3 pts), and for the commitment level available from the project team for this project (3 pts).

Experience in studies of the Canadian and U.S. light vehicle markets, vehicle technologies and attributes, and marketing research (25 points)

The bidder must provide a list of the relevant projects carried out by the project manager and by the team members, including a brief description of each of these projects, the responsibilities of the individuals, and the client for whom the work was performed.

Points are awarded for the experience in similar projects related to gathering information to characterize vehicle and engine fleet profiles in Canada; marketing, advertising, consumer acceptance, etc.; research on finance based marketing techniques and their influence on consumer choices; general knowledge of advanced light-duty vehicle technologies such as electric and hybrid vehicles. Additional points are awarded if any of these reports have been published and are publicly available. (0 projects – 0 points, 1 project – 2 points, 2 projects – 4 points, 3 or more projects – 5 points).

Respondents must achieve a **minimum of 35 points in each of the Technical Proposal and Qualifications and Experience** sections in order to be considered for the contract. The contract will be awarded to the respondent obtaining the highest combined rating of technical merit (70%) and price (30%). If no acceptable bids are received, Environment Canada has the right not to award this contract.

| | |
|--|----------------------|
| | Maximum score |
|--|----------------------|

| Technical Proposal | | |
|--|----------------------------|-----------|
| Understanding of Requirements (total of 10 points) <ul style="list-style-type: none"> • Knowledge of issues related to data available to meet the requirements • Understanding of project scope | 5 5 | |
| Approach, Methodology and Work (30 points) <ul style="list-style-type: none"> • Soundness and completeness of the methodology • Original or innovative ideas • Advantages of the proposed approach over alternatives • A description of expected outputs • Logical organization of tasks to be completed and their scheduling • Details on team composition, the responsibilities and expected efforts per task by team member | 6 4 4 5 5 6 | |
| Recognition of possible problems, proposed solutions, and additional suggestions (10 points) <ul style="list-style-type: none"> • Awareness of potential problems • Proposed solution to problems • Additional suggestions to improve the work | 2 3 5 | |
| Minimum Score 35 | Sub-total | 50 |
| Qualifications and Experience | | |
| Project Manager (total of 15 points) <ul style="list-style-type: none"> • Years of experience as a project manager (5+ years = 3 marks) • Relevant projects related to the vehicle attributes and profiles of Canadian and the US light-duty vehicle fleets and commitment level available for this project • Relevant skills to effectively manage this project | 3 8 4 | |
| Project team members (total of 10 points) <ul style="list-style-type: none"> • Relevant projects related to Canadian and the US light vehicle markets • Relevant skills to effectively execute this project • Commitment level available from the project team for this project | 4 3 3 | |
| Contractor's overall experience in on-road vehicle market research, | | |

| | | |
|---|------------------|------------|
| <p>vehicle technologies, and the Canadian and U.S vehicle fleet. (Each area below awards a maximum of 5 points: 0 projects – 0 points 1 project – 2 points 2 projects – 4 points 3 or more projects – 5 points Total of 25 points)</p> <ul style="list-style-type: none"> • Experience gathering information to characterize vehicle and engine fleet profiles in Canada. 5 • Experience with projects related to marketing, advertising, consumer acceptance, etc. 5 • Experience with research on finance based marketing techniques such as sale price, rebates, incentives, and changes to interest rates and their influence on consumer choices. 5 • Projects that highlight general knowledge of advanced light-duty vehicle technologies such as electric and hybrid vehicles. 5 • Publicly available reports from the contractor or team members that relate to market research. 5 | | |
| Minimum Score 35 | Sub-total | 50 |
| Minimum Score 70 | Total | 100 |

PART 5 - CERTIFICATIONS

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

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

The Contracting Authority will have the right to ask for additional information to verify the Bidder’s certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority may render the bid non-responsive or constitute a default under the Contract.

1. Certifications Required Precedent to Contract Award

1.1 Integrity Provisions - Associated Information

By submitting a bid, the Bidder certifies that the Bidder and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Bid of Standard Instructions 2003. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

1.2 Federal Contractors Program for Employment Equity - Bid Certification

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

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

2. Additional Certifications Required Precedent to Contract Award

The certifications listed below should be completed and submitted with the bid but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to comply with the request of the Contracting Authority and to provide the certifications within the time frame provided will render the bid non-responsive.

2.1 Status and Availability of Resources

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

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

2.2 Education and Experience

PWGSC SACC Manual clause A3010T 2010-08-16 Education and Experience

2.3 Rate or Price Certification

3. Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

PART 6 – SECURITY FINANCIAL BID AND OTHER REQUIREMENTS

1. Security Requirement

- (a) There is no security requirement applicable to this Contract.

PART 7 - RESULTING CONTRACT

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

1. Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex A.

2. Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the PWGSC *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

2.1 General Conditions

2010B (2016-04-04), General Conditions - Professional Services (Medium Complexity), as modified below, apply to and form part of the Contract.

General conditions 2010B is modified as follows:

At Section 12 Transportation Costs

Delete: In its entirety

Insert: "Deleted"

At Section 13 Transportation Carriers" Liability

Delete: In its entirety.

Insert: "Deleted"

At Section 18, Confidentiality:

Delete: In its entirety

Insert: "Deleted"

Insert Subsection: "35 Liability"

"The Contractor is liable for any damage caused by the Contractor, its employees, subcontractors, or agents to Canada or any third party. Canada is liable for any damage caused by Canada, its employees or agents to the Contractor or any third party. The Parties agree that no limitation of liability or indemnity provision applies to the Contract unless it is specifically incorporated in full text in the Articles of Agreement. Damage includes any injury to persons (including injury resulting in death) or loss of or damage to property (including real property) caused as a result of or during the performance of the Contract."

A. For professional services requirements where the deliverables are copyrightable works:

Canada to own Intellectual Property rights in Copyright

At Section 19 Copyright

Delete: In its entirety

Insert:

1. In this section:

"Material" means anything that is created or developed by the Contractor as part of the Work under the Contract, and in which copyright subsists.

"Background Information" means all Intellectual Property that is not Foreground Information that is incorporated into the Work or necessary for the performance of the Work and that is proprietary to or the confidential information of the Contractor, its subcontractors or any other third party;

"Foreground Information" means all Intellectual Property first conceived, developed, produced or reduced to practice as part of the Work under the Contract;

2. Material that is created or developed by the Contractor as part of the Work under the Contract belongs to Canada. The Contractor must incorporate the copyright symbol and either of the following notices, as appropriate: © Her Majesty the Queen in right of Canada (year) or © Sa Majesté la Reine du chef du Canada (année).
3. At the request of the Contracting Authority, the Contractor must provide to Canada, at the completion of the Work or at such other time as the Contracting Authority may require, a written permanent waiver of moral rights as defined in the [Copyright Act](#), R.S., 1985, c. C-42, in a form acceptable to the Contracting Authority, from every author that contributed to the Work. If the Contractor is an author, the Contractor permanently waives the Contractor's moral rights.
4. All Intellectual Property Rights in the Material belongs to Canada as soon as they come into existence. The Contractor has no right in or to any such Intellectual Property except any right that may be granted in writing by Canada.
5. The Contractor also grants to Canada a non-exclusive, perpetual, irrevocable, worldwide, fully-paid and royalty-free license to use the Background Information to the extent that this information is required by Canada to exercise its rights to use the Material. This license cannot be restricted in any way by the Contractor providing any form of notice to the contrary, including the wording on any shrink-wrapped license attached to any deliverable.

B. For standard service requirements 2010 B General Conditions Professional Services (Medium Complexity), must be modified as follows:

At Section 06 Subcontracts

Delete: paragraphs 1, 2, and 3 in their entirety.

Insert: "The Contractor may subcontract the supply of goods or services that are customarily subcontracted by the Contractor. Subcontracting does not relieve the Contractor from any of its obligations under the Contract or impose any liability upon Canada to a subcontractor. In any subcontract, the Contractor agrees to bind the subcontractor by the same conditions by which the Contractor is bound under the Contract, unless the Contracting Authority agrees otherwise, with the exception of requirements under the Federal Contractors Program for employment equity which only apply to the Contractor."

At Section 19 Copyright

Delete: In its entirety

Insert: "Deleted"

2.2 Deleted

2.3 Deleted

2.4 Deleted

3. Deleted

3.2 Deleted

4. Term of Contract

4.1 Period of the Contract

The period of the Contract is from contract award to the 30 March 2018 inclusive.

5. Authorities

5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Reg Landry
Title: Contracting Officer
Environment Canada
Procurement and Contracting Division
Address: 200 Sacre Coeur
Gatineau, QC
K1A 0H3
Telephone: 819 938 3064
E-mail address: reg.landry@canada.ca

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

5.2 Technical Authority

The Technical Authority for the Contract is: (to be named at contract award)

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

The Technical Authority named above is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Technical Authority, however the Technical Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

5.3 Contractor's Representative (to be named at contract award)

6. Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a *Public Service Superannuation Act* (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

7. Payment

7.1 Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price of \$ _____ (*insert the amount at contract award*). Customs duties are included.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

7.2 Limitation of Expenditure

- (a) Canada's total liability to the Contractor under the Contract must not exceed \$ _____. Customs duties are included and the Applicable Taxes are extra.
- (b) No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - (i) when it is 75 percent committed, or
 - (ii) four (4) months before the contract expiry date, or
 - (iii) as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,

whichever comes first.

- (c) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

7.3 Time Verification

C0711C (2008-05-12) Time Verification

8. Invoicing Instructions

8.1 All deliverables must be received and approved by the Project Authority within six (6) months of the commencement of the contract.

The Contractor shall invoice at the completion of deliverables, as described in the Basis of Payment at Annex B. The Contractor's invoices shall contain the following information:

- a) The Contract Number;
- b) Total Contract Value (excluding HST);
- c) Brief description of work completed, as reflected by that invoice;
- d) Date of work performed/completed;
- e) Total invoice cost (excluding HST);

- 8.1.1 The Contractor must submit invoices monthly in accordance with the section entitled "Invoice Submission" of the General Conditions.
- 8.1.2 Canada will pay the Contractor upon completion and delivery of the Work in accordance with the payment provisions of the Contract if:
- (a) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
 - (b) all such documents have been verified by Canada;
 - (c) the Work delivered has been accepted by Canada.
 - (d) all work associated with the milestone and as applicable any deliverable required have been completed and accepted by Canada.

9. Applicable Laws

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

10. Priority of Documents

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

- (a) the Articles of Agreement;
- (c) 2010B (2016-04-04) General Conditions - Professional Services (Medium Complexity)
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (k) the Contractor's bid dated _____,

ANNEX A STATEMENT OF WORK

ANALYSIS OF MANUFACTURERS' MARKETING DECISIONS AND STRATEGIES THAT DRIVE AUTOMOTIVE SALES AND VEHICLE TECHNOLOGIES

Background

Environment and Climate Change Canada first published the Passenger Automobile and Light Truck Greenhouse Gas Regulations in October of 2010. These Regulations established progressively more stringent GHG emission standards for light-duty vehicles of model years 2011-2016, in alignment with standards of the U.S Environmental Protection Agency. The Regulations were expected to result in emissions reductions of 92 Mt of CO₂e and net benefits of \$9.2 billion over the lifetime of Canadian vehicles of the 2011-2016 model years. Amendments to the Regulations were published in the Canada Gazette, Part II in October 2014 which establish more stringent standards for vehicles of model years 2017 to 2025, in alignment with standards of the U.S. EPA. The Regulations are expected to result in a cumulative reduction of 174 Mt of CO₂e and net benefits of \$49 billion over the lifetime operation of all 2017 to 2025 model year light-duty vehicles sold in Canada.

ECCC monitors the makeup of the Canadian fleet through reporting requirements contained in the Regulations, and the aligned nature of the Canadian and U.S. standards often leads to comparisons between the Canadian and U.S fleets. Many factors such as fuel costs, strength of the national economy, vehicle purchase prices, available options/features, consumer demands, body styles, regulatory requirements and manufacturer marketing all play a role in consumer purchase decisions.

The work will require the contractor to be familiar with the Canadian light-duty vehicle fleet profile, vehicle attributes, Canadian Regulations, vehicle advertising/marketing techniques and technologies that impact fuel efficiency and GHG emissions.

Objectives

The objective of this work is to examine the decisions and strategies used by automakers to promote and market different vehicle segments and technologies, and to describe (both qualitatively and quantitatively) the level of influence these decisions and strategies have on certain vehicle segments and technologies.

Tasks

The Contractor shall analyze all forms of promotion and marketing that are used in Canada by automakers (ex. Incentives/rebates, television and other media marketing, event sponsorship, etc.). The contractor must differentiate vehicle segments and analyse how marketing and promotion impact their sales. Some segments could include pick-up trucks, compact passenger cars, mid-sized SUVs, luxury vehicles, etc. The contractor will also need to consider the influence automakers have on directing consumers towards certain technologies like all-wheel-drive/4WD/4x4, turbocharging, hybrid powertrains, electric vehicles, etc. by examining incentives and promotional materials which describe the performance, safety, environmental impact, etc. of these technologies.

The analysis should include a qualitative (minimum) or quantitative (preferred) assessment on factors affecting recent market shifts, such as the increasing penetration of advanced technology vehicles (EVs and hybrids), and the increasing proportion of light trucks over passenger cars.

An analysis of how automakers allocate advertising budgets to certain vehicle segments and technologies will need to be considered as part of the market research. This analysis will also include an assessment of other factors which affect consumer purchase decisions such as fuel costs, strength of the national economy, vehicle purchase prices, available options/features, consumer demands, body styles and regulatory requirements

Task A: Project Plan

The Contractor is required to provide a plan outlining the intended approach to gather the necessary data to conduct the analysis. This plan will include data sources and any key assumptions the Contractor intends to use. If the contractor requires any decisions from the Project Authority regarding aspects of the project such as methodology, assumptions, etc., these decisions should be laid out in the project plan.

The plan should specifically identify the vehicle segments and technologies the contractor is proposing to assess and the additional non-marketing factors which impact consumer purchase decisions.

The project plan will also identify any potential limitations the contractor expects to encounter.

In a kick-off meeting or conference call and subsequent meetings/calls as required, the Project Authority and the Contractor will mutually agree upon methodology, key factors, scenario parameters and data format as appropriate.

Task B: Draft Data on Marketing investments and Incentive Programs

The Contractor is required to provide current marketing investments and incentives for the light-duty vehicle fleet broken down by vehicle segment and technology. This data should also be broken down by type of marketing medium (ex. Television, radio, print, etc.) and the different types of incentives offered (ex. Rebates, lower interest rates).

Task C: Draft Report and Presentation on the Overall Findings

A report that outlines the overall findings and provides a professional, qualitative assessment on the impacts certain marketing techniques and incentives have on shifting sales volumes to certain vehicle segments and technologies. This report shall also describe the data sources, analysis and methodology followed to determine the overall findings. The report will explicitly state all economic assumptions (including macro-economic factors). This final report will describe any difficulties experienced during the execution of the contract, and will make suggestions to improve future efforts of this type. The contractor will, as part of their submission of the draft report, present their findings to the project authority with a Powerpoint presentation made either in person, or by webinar/teleconference.

Task D: Final Data Set and Report

Provide a final report and data set which incorporates the comments and corrections of the project authority.

Deliverables:

The contractor shall submit each of the following deliverables to the Project Authority:

- 1. A project plan describing the methodology which will be followed to generate the data on marketing techniques and incentive programs as described in Task A**

The plan will outline the data sources, analysis, methodology, and any assumptions to be followed to develop the report. The plan describing the proposed methodology shall be submitted three (3) weeks after the start of the contract.

2. A draft report and data set, including a database or series of spreadsheets submitted using Microsoft Excel, Access and Word as appropriate, containing all required data to fully satisfy Tasks B and C in the Terms of Reference

This draft report shall be submitted twenty (20) weeks after the start of the contract. The project authority will be given 2 weeks to review and provide comments on the draft report and data set.

3. A final report and data set

This final report which fully satisfies the requirements of Task D in the Terms of Reference shall be submitted twenty six (26) weeks after the start of the contract.

All deliverables shall be submitted in electronic formats to the Project Authority for review and comment in Microsoft Office Suite Version 2010. The final report and data set should be submitted in both the Microsoft Office Suite Version 2010 and portable document format (.pdf). Appropriate revisions will be made based on the input received from the Project Authority. The Project Authority may make use of the assistance of a project team during review and comment.

Acceptance Criteria:

All deliverables are subject to the approval and acceptance of the Project Authority.

Travel:

The work will be completed exclusively within the contractor's office.

ANNEX B
BASIS OF PAYMENT

Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid as follows:

| <i>Deliverable</i> | <i>Task Description</i> | <i>Required Due date</i> | <i>Payment</i> |
|--------------------|--|-------------------------------|----------------|
| #1 | Task A Project Plan | 3 weeks after contract award | 20% |
| #2 | Task B Draft Data on Marketing Investment and Incentive Program | 18weeks after contract award | |
| #3 | Task C Draft Report | 22 weeks after contract award | 70 % |
| #4 | Task D Final Data Set and Report | 24 weeks after contract award | 10 % |
| <i>Total</i> | | | \$ |

The contract value cannot exceed \$75,000 CAD excluding tax.