



**Return Bids to :**

**Retourner Les Soumissions à :  
Natural Resources Canada**

NRCan.alberta\_bid\_submission-  
alberta\_bid\_submission.RNCan@canad  
a.ca

**Request for Proposal (RFP)  
Demande de proposition (DDP)**

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

**Comments – Commentaires**

**Issuing Office – Bureau de distribution**

Finance and Procurement Management  
Branch  
Natural Resources Canada  
Northern Forestry Center  
5320 – 122<sup>nd</sup> Street, Edmonton  
Alberta. T6H 3S5

**Title – Sujet**

To provide forecasts for regional Canadian softwood lumber production and exports, U.S. softwood lumber consumption and imports, and North American softwood lumber prices, for a variety of scenarios, through 2030

**Solicitation No. – No de l'invitation**

**NRCan- 5000033944**

**Date**

**31<sup>th</sup> October, 2017**

**Requisition Reference No. - No de la demande**

**141644**

**Solicitation Closes – L'invitation prend fin**

**at – à 02:00 PM (Mountain Standard Time (MST)**

**on – le 11<sup>th</sup> December, 2017**

**Address Enquiries to: - Adresse toutes questions à:**

**Kingsley Okosun**

**kingsley.okosun@canada.ca**

**Telephone No. – No de téléphone**

**(780) 435-7208**

**Fax No. – No. de Fax**

**Destination – of Goods and Services:**

**Destination – des biens et services:**

Natural Resources Canada  
CFS/NCR/TEIB  
580 Booth Street - 7-A7-2  
Ottawa, ON  
K1A 0E4

**Security – Sécurité**

There is no security requirements associated with this requirement.

**Vendor/Firm Name and Address**

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

**Telephone No.:- No. de téléphone:**

**Facsimile No.:- No. de télécopieur:**

**Name and Title of person authorized to sign on behalf of Vendor/Firm (type or print)**

**Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie)**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



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The Articles contains in this document are mandatory in their entirety, unless otherwise indicated. Acceptance of these Articles, in their entirety, as they appear in this document, is a Mandatory requirement of this RFP. Suppliers submitting a proposal containing statements implying that their proposal is conditional on modification of these clauses or containing terms and conditions that purport to supersede these clauses or derogate from them will be considered non-responsive.

Bidders with concerns regarding the provisions of the Bid Solicitation document (including the Resulting Contract Clauses) should raise such concerns in accordance with the Enquiries provision of this RFP.



## **PART 1 - GENERAL INFORMATION**

### **1.1 Introduction**

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

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

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

The Appendixes include the Evaluation Criteria and the Financial Proposal Form.

### **1.2 Summary**

By means of the RFP, NRCan is seeking proposals from bidders to provide forecasts for regional Canadian softwood lumber production and exports, U.S. softwood lumber consumption and imports, and North American softwood lumber prices, for a variety of scenarios, through 2030

The requirement is subject to the provisions of the North American Free Trade Agreement (NAFTA), and the Canadian Free Trade Agreement (CFTA).

### **1.3 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 from receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.



## PART 2 - BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

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

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

The 2003 (2017-04-27) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation with the modifications to the text below. If there is a conflict between the provisions of 2003 and this document, this document prevails.

- **In the complete text content (except Section 3) Delete:** Public Works and Government Services Canada” and **Insert:** “Natural Resources Canada.” **Delete:** “PWGSC” and **Insert:** “NRCan”
- **Section 2: Delete:** “Suppliers are required to” and **Insert:** “It is suggested that suppliers”
- **Subsection 1 of Section 8: Delete entirely**
- **Under Subsection 2 of Section 20:** Not applicable

Subsection 5.4 of 2003, Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days

Insert: 120 days

### 2.2 Submission of Bids

It is the Bidders responsibility to ensure that proposals are sent to the following e-mail address, by the time and date indicated on page 1 of this RFP document:

**NRCan.alberta\_bid\_submission-alberta\_bid\_submission.RNCan@canada.ca**

#### IMPORTANT

It is requested that you write the following information in “Subject” of the e-mail:

**NRCan- 5000033944 - For Regional Canadian softwood lumber production and exports**

The address above is reserved for the submission of your proposal. No other communication should be sent to that address.

**Due to the nature of the bid solicitation, bids transmitted by mail or facsimile to NRCan will not be accepted.**

**NRCan will not assume responsibility for proposals directed to any other location.**

The onus is on the Bidder to ensure that the proposal is submitted correctly to the above address. Not complying with the above instructions may result in NRCan’s inability to ascertain reception date and/or to consider the bid prior to contract award. Therefore, NRCan reserves the right to reject any proposal not complying with these instructions.



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### **2.3 Enquiries - Bid Solicitation**

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

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the 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.

### **2.4 Applicable Laws**

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

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

### **2.5 Basis for Canada's Ownership of Intellectual Property**

Natural Resources 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;



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## **PART 3 - BID PREPARATION INSTRUCTIONS**

### **3.1 Bid Preparation Instructions**

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

Section I: Technical Bid (1 electronic copy)

Section II: Financial Bid (1 electronic copy) in a separate file and document

Section III: Certifications (1 electronic copy)

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

#### **Section I: Technical Bid**

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

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

#### **Section II: Financial Bid**

Bidders should submit their financial bid in accordance with the Financial Proposal Form in Appendix "2" The total amount of Applicable Taxes must be shown separately.

##### **Exchange Rate Fluctuation**

C3011T (2013-11-06), Exchange Rate Fluctuation

#### **Section III: Certifications**

Bidders must submit the certifications required under Part 5.



## **PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION**

### **4.1 Evaluation Procedures**

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

#### **4.1.1 Technical Evaluation**

Mandatory and point rated technical evaluation criteria are included in Appendix "1" Evaluation Criteria.

#### **4.1.2 Financial Evaluation**

Mandatory financial evaluation criteria are included in Appendix "2" Financial Proposal Form.

### **4.2 Basis of Selection**

#### **4.2.1 Highest Combined Rating of Technical Merit and Price**

1. To be declared responsive, a bid must:
  - a. comply with all the requirements of the bid solicitation; and
  - b. meet all mandatory criteria; and
  - c. obtain the required minimum of 75 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 124 points.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70 % for the technical merit and 30 % for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70 %.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30 %.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.





The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points equal 135 and the lowest evaluated price is \$45,000 (45).

| <b>Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)</b> |                              |                             |                            |                            |
|---|------------------------------|-----------------------------|----------------------------|----------------------------|
|   |                              | <b>Bidder 1</b>             | <b>Bidder 2</b>            | <b>Bidder 3</b>            |
| <b>Overall Technical Score</b>  |                              | 115/135                     | 89/135                     | 92/135                     |
| <b>Bid Evaluated Price</b>  |                              | \$55,000.00                 | \$50,000.00                | \$45,000.00                |
| <b>Calculations</b>   | <b>Technical Merit Score</b> | $115/135 \times 70 = 59.62$ | $89/135 \times 70 = 46.14$ | $92/135 \times 70 = 47.70$ |
|   | <b>Pricing Score</b>         | $45/55 \times 30 = 24.54$   | $45/50 \times 30 = 27.00$  | $45/45 \times 30 = 30.00$  |
| <b>Combined Rating</b>  |                              | 84.16                       | 73.14                      | 77.70                      |
| <b>Overall Rating</b>   |                              | 1st                         | 3rd                        | 2nd                        |



## **PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION**

Bidders must provide the required certifications and additional 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 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 will render the bid non-responsive or constitute a default under the Contract.

### **5.1 Certifications Required with the Bid**

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

#### **5.1.1 Declaration of Convicted Offences**

In accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide with its bid the required documentation, as applicable, to be given further consideration in the procurement process.

### **5.2 Certifications Precedent to Contract Award and Additional Information**

The certifications and additional information listed below should be submitted with the bid but may be submitted afterwards. If any of these required certifications or additional information 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 provide the certifications or the additional information listed below within the time frame specified will render the bid non-responsive.

#### **5.2.1 Integrity Provisions – List of Names**

In accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide with its bid the required documentation, as applicable, to be given further consideration in the procurement process.

- Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder or, in the case of a private company, the owners of the company.
- Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s).
- Bidders bidding as partnerships do not need to provide lists of names.

Name of Bidder: \_\_\_\_\_



OR

Name of each member of the joint venture:

Member 1: \_\_\_\_\_

Member 2: \_\_\_\_\_

Member 3: \_\_\_\_\_

Member 4: \_\_\_\_\_

Identification of the administrators/owners:

| SURNAME | NAME | TITLE |
|---------|------|-------|
|         |      |       |
|         |      |       |
|         |      |       |
|         |      |       |
|         |      |       |

### 5.2.2 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](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.

### 5.2.3 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.

#### 5.2.4 Education and Experience

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

#### 5.2.5 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, 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 FPSs 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.

Professional fees

Amount

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

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.



## 5.2.6 Aboriginal Designation

Who is eligible?

a) An Aboriginal business, which can be:

- i. a band as defined by the Indian Act
- ii. a sole proprietorship
- iii. a limited company
- iv. a co-operative
- v. a partnership
- vi. a not-for-profit organization

in which Aboriginal persons have at least 51 percent ownership and control,

OR

b. A joint venture consisting of two or more Aboriginal businesses or an Aboriginal business and a non-Aboriginal business(es), provided that the Aboriginal business(es) has at least 51 percent ownership and control of the joint venture.

When an Aboriginal business has six or more full-time employees at the date of submitting the bid, at least thirty-three percent of them must be Aboriginal persons, and this ratio must be maintained throughout the duration of the contract.

The bidder must certify in its submitted bid that it is an Aboriginal business or a joint venture constituted as described above.

☐ Our Company is NOT an Aboriginal Firm, as identified above.

☐ Our Company is an Aboriginal Firm, as identified above. The supplier must complete the certificate in the appropriate clause below.

SACC Manual clauses A3000T, A3001T, M3030T, M9030T, S3035T and S3036T contain a certification that suppliers must complete and submit with their bid/offer/arrangement. Failure by suppliers to submit this completed certification form with their bids/offers/arrangements will render the bid/offer/arrangement non-responsive.



## **PART 6 - SECURITY REQUIREMENTS**

### **6.1 Security Requirements**

There is no security requirement applicable to this Contract.



## **PART 7 - RESULTING CONTRACT CLAUSES**

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

### **7.1 Statement of Work**

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A" and the Contractor's technical bid entitled \_\_\_\_\_, dated \_\_\_\_\_. (*to be completed at contract award*)

### **7.2 Standard Clauses and Conditions**

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

#### **7.2.1 General Conditions**

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

- As applicable, replace references to Public Works and Government Services Canada (PWGSC) with Natural Resources Canada (NRCan).

#### **7.2.2 Supplemental General Conditions**

The following clauses apply to this contract:

4007 (2010-08-16) Canada to Own Intellectual Property Rights in Foreground Information

#### **7.2.3 Non-disclosure Agreement**

The Contractor must obtain from its employee(s) or subcontractor(s) the completed and signed non-disclosure agreement, attached at **Annex C**, and provide it to the Technical Authority before they are given access to information by or on behalf of Canada in connection with the Work.

### **7.3 Dispute Resolution**

#### *Mediation*

If a dispute arising from this contract cannot be settled amicably through negotiation, then the parties agree in good faith to submit the dispute to mediation as administered by the Arbitration and Mediation Institute of Canada Inc. (AMIC). The parties acknowledge receipt of the rules of AMIC. The cost of mediation shall be borne equally by the parties.

#### *Arbitration*

If the parties cannot resolve the dispute through mediation within sixty (60) days, the parties agree to submit the dispute to arbitration pursuant to the Commercial Arbitration Act (Canada). The party requesting such arbitration shall do so by written notice to the other party/parties. The cost of the arbitration and fees of the arbitrator shall be borne equally by the parties. The arbitration shall take place in the city where the contractor carries on business before a single arbitrator to be chosen jointly by the





parties. If the parties cannot agree on the choice of arbitrator within thirty (30) days of written notice to submit the dispute to arbitration, each party will choose a representative who will select the arbitrator. The parties may determine the procedure to be followed by the arbitrator in conducting the proceedings, or may ask the arbitrator to do so. The arbitrator shall issue a written award within thirty (30) days of hearing the parties. The award may be entered in any court having jurisdiction and enforced as a judgment of that court.

#### *Meaning of "Dispute"*

The parties agree that the word "dispute" in this clause refers to a dispute of fact or of law, other than a dispute of public law.

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the *Department of Public Works and Government Services Act* will, on request or consent of the parties to participate in an alternative dispute resolution process to resolve any dispute between the parties respecting the interpretation or application of a term and condition of this contract and their consent to bear the cost of such process, provide to the parties a proposal for an alternative dispute resolution process to resolve their dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at [boa.opo@boa.opo.gc.ca](mailto:boa.opo@boa.opo.gc.ca).

## **7.4 Security Requirements**

**7.4.1** There is no security requirement applicable to this Contract.

## **7.5 Term of Contract**

### **7.5.1 Period of the Contract**

The period of the Contract is from date of Contract to **March 31, 2018 inclusive**.

## **7.6 Authorities**

### **7.6.1 Contracting Authority**

The Contracting Authority for the Contract is:

Name: Kingsley Okosun  
Title: Procurement Officer  
Organization: Natural Resources Canada  
Address: 5320 – 122<sup>nd</sup> Street, Edmonton, AB. T6H 3S5  
Telephone: 780-435-7208  
E-mail address: [Kingsley.okosun@canada.ca](mailto:Kingsley.okosun@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.

### **7.6.2 Project Authority (to be provided at contract award)**

The Project Authority for the Contract is:



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

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

### **7.6.3 Contractor's Representative (*to be provided at contract award*)**

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

## **7.7 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.

## **7.8 Payment**

### **7.8.1 Basis of Payment Basis of Payment – Firm Price**

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price, *as specified in Annex B for a cost of \$ \_\_\_\_\_ insert the amount at contract award*). Customs duties are *included*", and Applicable Taxes are extra.

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

### **7.8.2 Method of Payment**

#### **Single Payment**

Canada will pay the Contractor upon completion and delivery of the Work in accordance with the payment provisions of the Contract if:

- a. an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;



- b. all such documents have been verified by Canada;
- c. the Work delivered has been accepted by Canada.

## 7.9 Invoicing Instructions

Invoices shall be submitted using **one of the following methods:**

|   |
|---|
| <p><u>E-mail:</u></p> <p><u>NRCan.invoice_imaging-service_dimagerie_des_factures.NRCan@canada.ca</u></p> <p><b>Note:</b><br/>Attach "PDF" file. No other formats will be accepted</p> |
| <b>OR</b>   |
| <p><u>Fax:</u></p> <p>Local NCR region: <b>613-947-0987</b><br/>Toll-free: <b>1-877-947-0987</b></p> <p><b>Note:</b><br/>Use highest quality settings available.</p>                  |

Please do not submit invoices using more than one method as this will not expedite payment.

Invoices and all documents relating to a contract must be submitted on the Contractor's own form and shall bear the following reference numbers: Contract number: \_\_\_\_\_

**Invoicing Instructions to suppliers:** <http://www.nrcan.gc.ca/procurement/3485>

## 7.10 Certifications

### 7.10.1 Compliance

The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing additional information are conditions of the Contract. Certifications are subject to verification by Canada during the entire period of the Contract. If the Contractor does not comply with any certification, fails to provide the additional information, or if it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

## 7.11 Applicable Laws

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

## 7.12 Priority of Documents



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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions 4007(2010-08-16) - Canada to Own Intellectual Property Rights in Foreground Information;
- (c) the general conditions 2010B (2016-04-04) – Professional Services - Medium Complexity;
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) the Contractor's bid dated \_\_\_\_\_

### **7.13 Foreign Nationals (Canadian Contractor **OR** Foreign Contractor)**

SACC Manual clause A2000C (2006-06-16) - Foreign Nationals (Canadian Contractor)

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

### **7.14 Insurance**

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

### **7.15 Contract Administration**

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the *Department of Public Works and Government Services Act* will review a complaint filed by [*the supplier or the contractor or the name of the entity awarded this contract*] respecting administration of this contract if the requirements of Subsection 22.2(1) of the *Department of Public Works and Government Services Act* and Sections 15 and 16 of the *Procurement Ombudsman Regulations* have been met, and the interpretation and application of the terms and conditions and the scope of the work of this contract are not in dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at [boa.opo@boa.opo.gc.ca](mailto:boa.opo@boa.opo.gc.ca).



## **ANNEX “A” - STATEMENT OF WORK**

### **SW1. Title**

Canadian Softwood Lumber Production and Trade - Quarterly Forecasts

### **SW2. Background**

The U.S. Department of Commerce (DOC) has begun countervailing duty (CVD) and anti-dumping (AD) investigations into imports of Canadian softwood lumber (SWL), with preliminary CVD and AD duties averaging around 26.75%.

The U.S. is Canada's largest market for softwood lumber, with exports totaling \$7.5 billion in 2016. The largest source (~2/3) of demand is construction, home repairs and remodeling, as 90% of U.S. homes are built with wood. The U.S. housing market is improving and this is growing demand for Canada's softwood lumber products. The ongoing Canada-U.S. softwood lumber dispute and the duties on Canadian SWL exports to the U.S. could have a significant impact on Canadian SWL producers.

As part of its core mandate and strategic priorities, Natural Resources Canada (NRCan) seeks to support the competitiveness of Canada's natural resource sectors. The Canadian Forest Sector (CFS) needs to understand the impact of this trade dispute and potential negotiated settlements, on: the production and exports of Canadian softwood lumber, U.S. imports of softwood lumber, and softwood lumber prices.

### **SW3. Objectives**

The goal of this project is to understand the impacts that potential trade barriers to Canada's softwood lumber exports to the US would have on the Canadian softwood lumber industry. The U.S. has already imposed a trade barrier in the form of preliminary CVD/AD import duties on Canadian softwood lumber, but such trade barriers may change in the near future (e.g. following the final CVD/AD determination by the US, or a new Canada-U.S. softwood lumber agreement). NRCan would like to explore the impact(s) that various hypothetical trade barrier scenarios (outlined in SW 4.1- Required content) would have on Canadian softwood lumber production and exports, U.S. softwood lumber consumption and imports, and North American softwood lumber prices. To provide a comparison, NRCan would also like to compare forecasts of the hypothetical scenarios against forecasts of three base-case scenarios: 1) a free trade scenario (no duties or trade restrictions in place), 2) a scenario reflecting preliminary CVD/AD import duty rates, , and 3) trade barriers in place similar to that of the 2006 softwood lumber agreement (SLA 2006). To that end, we require quarterly forecasts for each year from 2018-2030, for each of the following variables:

- 1) U.S. softwood lumber consumption;
- 2) U.S. SWL imports from non-Canadian countries;
- 3) Canadian SWL production, by region;
- 4) Canadian SWL exports to the U.S., by exporting region;
- 5) Canadian SWL offshore exports, by exporting region;
- 6) Random Lengths Framing Lumber Composite price;
- 7) Western SPF 2x4 #2&btr price.

For the regional variables (#3, 4, 5), we require the following breakdown:

- BC Coast;
- BC Inland/Interior;
- Alberta;
- Ontario;
- Quebec;
- Prairie provinces (Saskatchewan and Manitoba, aggregated together);



- Atlantic Canada (New Brunswick, Nova Scotia, PEI, Newfoundland & Labrador, all aggregated together).

The specific scenarios which we would like the forecasts to consider are listed in SW4, Project Requirements. Following the forecasts, we require a written report. For each forecast, we require a write-up explaining the results of the forecast and the factors driving those results, and the factors driving any differences between the scenario in question and the base-case scenario.

## **SW4. Project Requirements**

### **SW4.1 Tasks, Deliverables, and Schedule**

Forecast of Canadian lumber production and exports, U.S. lumber consumption, and North American softwood lumber prices

Due to the ongoing trade negotiations and potential economic impact from the trade dispute, this research is very sensitive and the Project must be treated with confidentiality, including all communication, results and deliverables.

The Project includes multiple task based requirements that include data forecasts and analysis, as well as a presentation/report outlining the results and a presentation of the results to NRCan and other interested federal departments/agencies. Details as follows:

#### **SW4.1.1 Tasks**

##### **A) FORECASTS**

For each of the 12 scenarios specified below, we require a quarterly forecast, for each year from 2018-2030, for each of the following variables (reported using the specified units):

- 1) U.S. softwood lumber consumption (MBF);
- 2) U.S. SWL imports from non-Canadian countries (MBF);
- 3) Canadian SWL production, by region (MBF);
- 4) Canadian SWL exports to the U.S., by exporting region (MBF);
- 5) Canadian SWL offshore exports, by exporting region (MBF);
- 6) Random Lengths Framing Lumber Composite price (US\$/MBF);
- 7) Western SPF 2x4 #2&btr price (US\$/MBF; must be comparable to Random Lengths' or Madison's measure).

For the regional variables (#3, 4, 5), we require forecasts for each of the following regions:

- BC Coast;
- BC Inland/Interior;
- Alberta;
- Ontario;
- Quebec;
- Prairie provinces (Saskatchewan and Manitoba, aggregated together);
- Atlantic Canada (New Brunswick, Nova Scotia, PEI, Newfoundland & Labrador, all aggregated together).

Scenarios:

- Base-case scenarios:

- 1) Free trade (no import duties or trade restrictions on Canadian SWL)
- 2) Preliminary CVD/AD duties in place on Canadian SWL exports to the U.S. Duty application must be region-specific and consider different CVD/AD rates assigned to respondents.



- 3) Trade conditions identical to those imposed under SLA 2006. These conditions must be imposed at the regional level, as stipulated in the 2006 Canada-United States Softwood Lumber Agreement.

#### Hypothetical scenarios

- 4) A different set of duties applied to Canadian SWL exports to the U.S., to be determined at a later date. Duty application must be region-specific and consider different CVD/AD rates assigned to respondents.
- 5) Canadian SWL exports to the U.S. limited to 30% of U.S. consumption.
- 6) Canadian SWL exports to the U.S. limited to 30% of U.S. consumption in 2018, declining annually by 1% until 2020, at which point market share remains at 28% for remainder of forecast.
- 7) Scenarios 7-12 to be determined in consultation with NRCan following discussion of results of first 6 scenarios. Like scenarios 1-6, these additional scenarios will involve import duties, export charges, market share-based quotas, and/or regional exemptions from duties/charges/quota.

Following the forecast of the first 6 scenarios, supplier will present results to NRCan, and discuss the remaining 6 scenarios to be forecast.

Numerical results of each forecast will be provided in an Excel file, to the level of precision specified for each variable. Results will be presented quarterly, for each year from 2018 to 2030, for each variable within each scenario.

#### B) WRITTEN REPORT

In addition to the forecasts, we require a written report, explaining the results of the forecasts for each scenario. These explanations must include a detailed description of the factors driving the results and any differences between the scenario in question and the base-case scenarios.

A draft report will be provided to NRCan, allowing a chance to comment. Final report with executive summary to be provided following NRCan comments.

#### C) PRESENTATION OF RESULTS

Following forecasting and report, a PowerPoint presentation will be made to NRCan employees via webcast, highlighting the important results from the forecasts for each scenario. Supplier will then answer questions about the presentation and/or report. Approx. duration, 2-3 hours.

#### D) DISCUSSION

Subsequently, the supplier will be available for further discussion about the report or the results of the forecasting, and to provide assistance with interpretation.

### **SW4.1.2 Deliverables**

1. Kick-off phone call to clarify questions about project intention, scope, etc. Scenario 4 to be determined during conversation.
2. Weekly project discussions and status updates via call/email.
3. Excel file with results of first 6 scenario forecasts. Follow-up phone call to NRCan to discuss results of these forecasts, and determine remaining 6 scenarios to be forecast.
4. Excel file with results of remaining 6 scenarios



5. Draft Report, detailing progress and findings to date. Must explain the results of the forecasts for each scenario, and detail the factors driving the results in each scenario. For comment by NRCan.
6. Final Report, including an executive summary, comparative analysis among scenarios, and detailed discussion of factors driving the differences between each scenario and the base-case scenario.
7. A presentation to NRCan-CFS staff of the results.
8. Follow-up conversation(s) with NRCan to clarify results and assist with interpretation.

#### **SW4.1.3 Schedule**

Week 1: Kick-off phone call to occur within 1 week of contract being awarded.

Week 3: Forecast results for first 6 scenarios provided to NRCan by end of week 3. Follow-up phone call with NRCan to discuss results and determine scenarios 7-12.

Week 5: Forecast results for remaining 6 scenarios, and draft report, provided to NRCan by end of week 5.

Week 6: NRCan to provide feedback on draft report.

Week 7: Final report provided to NRCan by end of week 7.

Week 8: Slide deck presentation and discussion by end of week 8.

Week 9 and onwards: Additional follow-up conversations as required, within 2 months of presentation.  
Total time ~4 hours.

It is expected that frequent interactions with NRCan staff will be required throughout the contract, particularly in terms of agreeing to scenarios and discussing results.

**Forecasts must be proprietary and conducted “in-house” (i.e. not sub-contracted out, or based on the work of other individuals or organizations).**

#### **SW4.2 Reporting Requirements**

When requested by the Project Authority (PA), the Contractor must provide a progress update, in a format acceptable to the PA (e.g. email summary).

#### **SW4.3 Method and Source of Acceptance**

All deliverables and services rendered under any contract are subject to inspection by the Project Authority. The PA shall have the right to reject any deliverables that are not considered satisfactory, or require their correction before payment will be authorized.





**ANNEX “B” - BASIS OF PAYMENT**

*(to be completed at contract award)*



### **ANNEX "C" – NON DISCLOSURE AGREEMENT**

I, \_\_\_\_\_, recognize that in the course of my work as an employee or subcontractor of \_\_\_\_\_, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No \_\_\_\_\_ *(to be completed at contract award)* between Her Majesty the Queen in right of Canada, represented by the Minister of Public Works and Government Services, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract Serial No.: \_\_\_\_\_ *(to be completed at contract award)*

\_\_\_\_\_  
Signature



## APPENDIX “1” - EVALUATION CRITERIA

Bidders are advised to address these criteria in the following order and in sufficient depth in their proposals to enable a thorough assessment. NRCan’s assessment will be based solely on the information contained within the proposal. NRCan may confirm information or seek clarification from bidders.

Bidders are advised that only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the criteria will not be considered demonstrated for the purpose of this evaluation.

The Bidder should provide complete details as to where, when (month and year) and how (through which activities/ responsibilities) the stated qualifications/experience were obtained. Experience gained during formal education shall not be considered work experience. All criteria for work experience shall be obtained in a legitimate work environment as opposed to an educational setting. Co-op terms are considered work experience provided they are related to the required services.

Bidders are also advised that the month(s) of experience listed for a project whose time frame overlaps that of another referenced project will only be counted once. For example: project one time frame is July 2001 to December 2001; project two time frame is October 2001 to January 2002; the total months of experience for these two project references is seven (7) months.

### 1. TECHNICAL CRITERIA

#### 1.1 MANDATORY EVALUATION CRITERIA

The Mandatory Criteria listed below will be evaluated on a simple pass/fail basis. Proposals which fail to meet the mandatory criteria will be deemed non-responsive.

| Criterion ID | Mandatory Criteria   | Proposal Page # | Pass/Fail |
|--------------|--|-----------------|-----------|
| M1           | <p>The Bidder <b>MUST</b> submit a minimum of five (5) project summaries for evaluation. These project summaries must demonstrate that the Bidder has recent experience (over the last 3 years) providing economic analysis of the forest industry in North America.</p> <p><i>“Economic-analysis” projects include, inter-alia, providing economic forecasting, scenario analyses, or cost-benefit analyses.</i></p> <p>The project summaries should include, at a minimum:</p> <ul style="list-style-type: none"><li>• Name and description of client organization;</li><li>• Name, phone, email of client;</li><li>• Scope, objective, size in dollars and resources, project timeframe (from-to dates (depicted using month/year start and end points));</li><li>• Outcomes of the project;</li><li>• Description of the consultant roles and responsibilities in the project.</li></ul> |                 |           |



| Criterion ID | Mandatory Criteria   | Proposal Page # | Pass/Fail |
|--------------|--|-----------------|-----------|
| M2           | The Bidder <b>MUST</b> demonstrate that within each of the past 5 years they have produced publicly available measurements and forecasts of North American forest industry economic indicators.<br>The indicators should include at least: sub-national softwood lumber (SWL) production volumes, sub-national SWL export volumes, national SWL import volumes, and SWL prices.<br>All forecasts must extend at least 5 years into the future, have been released on an annual (or more frequent) basis, and have at least annual granularity. |                 |           |
| M3           | The Bidder <b>MUST</b> propose a team of a minimum of: <ul style="list-style-type: none"><li>• One (1) Owner/Managing Director</li><li>• One (1) Project Manager/Leader</li><li>• Two (2) Senior Analysts or Senior Auditors</li></ul> A detailed CV must be presented for each of the proposed team members. Owner/Managing Director and Project Manager/Leader may be the same person.   |                 |           |
| M4           | The proposed project manager/leader <b>MUST</b> have experience managing at least <b>5</b> projects focused on economic analysis of the forest industry in North America.<br><i>"Economic-analysis" projects include, inter-alia, providing economic forecasting, scenario analyses or cost-benefit analyses.</i>  |                 |           |

## 1.2 EVALUATION OF RATED CRITERIA

The criteria contained herein will be used by NRCan to evaluate each proposal that has met all of the mandatory criteria.

Proposals must achieve the stated minimum points required for each rated criterion to be assessed as responsive under the point rated technical criteria section; proposals not meeting the minimum required points will be deemed non-responsive.

Proposals will be evaluated based on the following criteria:

| Criterion ID | Point Rated Technical Criteria  | Minimum Points /Maximum Points | Proposal Page # |
|--------------|---|--------------------------------|-----------------|
| R1           | Bidder has experience undertaking forest industry economic analysis related to a manufacturing industry in the past five (5) years.<br>The Bidder should describe each surveying project, including: <ul style="list-style-type: none"><li>• Project objectives</li><li>• Overview of Methodology</li></ul> | 20                             |                 |



|           |   |           |  |
|-----------|---|-----------|--|
|           | <ul style="list-style-type: none"><li>• Project date and length.</li></ul> <b>2 points per project, in addition to the projects presented for M1, up to 20 points.</b>  |           |  |
| <b>R2</b> | <p>Two (2) members of the project team have a university degree in Forestry, Forest Economics, Resource Economics, or Economics.</p> <p>A copy of the degree may be requested prior to contact award.<br/>5 points per member.</p>  | <b>10</b> |  |
| <b>R3</b> | <p>The Bidder demonstrate understanding of the requirements of SW4.1, including current industry context, project goals and scope, feasibility of project, potential challenges. The Bidder should also demonstrate knowledge of the factors that influence each of the variables required to be forecast specified in SW4.1.</p> <p><b>The criteria is barely addressed:</b> the response <u>contains significant</u> omissions or misunderstandings. As described in their proposal, the bidder's understanding <u>addresses none</u> of the factors related to undertaking the work and the bidder has demonstrated an understanding that is not particularly <u>related</u> to this requirement. <b>(5 points)</b></p> <p><b>The criteria is partially addressed:</b> the response <u>contains occasional</u> omissions or misunderstandings. As described in their proposal, the bidder's understanding <u>addresses some</u> of the factors related to undertaking the work and the bidder has demonstrated an understanding that is <u>related to this requirement</u>. <b>(10 points)</b></p> <p><b>The criteria is adequately addressed:</b> the response <u>contains minor</u> omissions and/or misunderstandings. As described in their proposal, the bidder's understanding <u>addresses most</u> of the factors related to undertaking the work and the bidder has demonstrated an understanding that is <u>related to this requirement</u>. Bidder has demonstrated a clear understanding of project deliverables <b>(15 points)</b></p> <p><b>The criteria is very appropriately addressed:</b> the response <u>does not contain omissions</u> or misunderstandings. As described in their proposal, the bidder's understanding <u>addresses most</u> of the factors related to undertaking the work and the bidder has demonstrated an understanding that is clearly <u>related to this requirement</u>. Bidder has demonstrated a clear understanding of project deliverables <b>(20 points)</b></p> <p><b>The criteria is remarkably well addressed:</b> The response <u>does not contain omissions</u> or misunderstandings. As described in their proposal, the bidder's understanding <u>addresses all</u> of the factors related to undertaking the work and the bidder has demonstrated an understanding that is highly <u>related to this requirement</u>. Bidder has demonstrated a clear understanding of project deliverables <b>(25 points)</b></p> | <b>25</b> |  |



|           |   |           |  |
|-----------|---|-----------|--|
|           |   |           |  |
| <b>R4</b> | <p>The Bidder's proposed approach to deliver the requirement under SW4.1 Part A, will be assessed, in particular based on the elements below:</p> <ul style="list-style-type: none"><li>- information gathering, data source, data analysis and quality assurance and reporting on results.</li><li>- discussion of how regional breakdown of forecasts and scenario assumptions will be achieved (where necessary)</li><li>- identification of potential challenges, and means of overcoming those challenges</li><li>- realistic and achievable deliverables framework including practical time schedule and achievable milestones.</li><li>- description of appropriate modeling approach to be used, and description of appropriate deliverables</li></ul> <p><b>The criteria is barely addressed:</b> the approach proposed does not address the important factors<br/>The proposed approach has significant weaknesses, and would probably not meet the requirements of the application under SW4.1 Part A and does not constitute a technical value to Canada. <b>(5 points)</b></p> <p><b>The criteria is partially addressed:</b> the proposed approach addresses some important factors. The proposed approach has weaknesses, and would probably not meet the requirements or would probably not be effective, and not a good technical value for Canada. <b>(10 points)</b></p> <p><b>The criteria is adequately addressed:</b> the proposed approach adequately addresses most of the important factors, and includes an appropriate modeling approach. The proposed approach has minor weaknesses, would likely meet the requirements and is a good technical value for Canada. <b>(15 points)</b><br/><b>(15 points)</b></p> <p><b>The criteria is very appropriately addressed:</b> the proposed approach fully <u>addresses all the important factors</u>, and includes an appropriate modeling approach. The proposed approach has no significant weakness, would likely meet the requirements, would probably be effective, would yield very good results and constitute a very good technical value for the Canada. <b>(20 points)</b></p> <p><b>The criteria is remarkably well addressed):</b> the proposed approach <u>addresses all the important factors</u>. The proposed approach has no apparent weakness, would likely meet the requirements of the bid solicitation, would probably be effective, give excellent results and provide excellent technical value for Canada. <b>(25 points)</b></p> | <b>25</b> |  |
| <b>R5</b> | <p>The Bidder can demonstrate that they have forecasted the following forest industry economic variables, annually or more</p>  | <b>44</b> |  |



|  |   |            |  |
|--|---|------------|--|
|  | <p>frequently, over the past 5 years:</p> <ol style="list-style-type: none"><li>1) U.S. softwood lumber consumption (MBF);</li><li>2) U.S. SWL imports from non-Canadian countries (MBF);</li><li>3) Canadian SWL production (MBF);</li><li>4) Canadian SWL exports to the U.S. (MBF);</li><li>5) Canadian SWL offshore exports (MBF);</li><li>6) Random Lengths Framing Lumber Composite price (US\$/MBF);</li><li>7) Western SPF 2x4 #2&amp;btr price (US\$/MBF; must be comparable to Random Lengths' or Madison's measure).</li><li>8) U.S. housing starts</li></ol> <p><b>2 points</b> per variable forecast for at least the past 3 years,<br/><b>4points</b> per variable forecast for at least the past 5 years.<br/><b>3 additional points</b> for each of variables 3, 4, and 5 if they have been forecast at sub-national level for at least the past 3 years.<br/><b>3 additional points</b> for variable 1 if consumption forecasts have been broken down into at least 3 components of consumption (e.g. single family home construction; multifamily home construction; restoration and renovation; etc.) for at least the past 3 years.</p> |            |  |
|  | <b>Minimum Points</b>   | <b>75</b>  |  |
|  | <b>Total points</b>   | <b>124</b> |  |



## APPENDIX “2” – FINANCIAL PROPOSAL FORM

### 1. FINANCIAL CRITERIA

#### 1.1 MANDATORY FINANCIAL CRITERIA

Bidders must provide financial details as requested in this appendix. Proposals which do not contain pricing details as requested below shall be considered incomplete and non-responsive.

##### 1.1.1 FUNDING LIMITATION

The maximum funding available for the Contract resulting from the bid solicitation is **\$150,000.00 (Applicable Taxes extra)**. Bids valued in excess of this amount will be considered non-responsive. This disclosure does not commit Canada to pay the maximum funding available.

This maximum included a) the Price to perform the Work, b) any Travel and Living and c) Miscellaneous Expenses that may be required.

Any bids received in excess of this maximum funding will be automatically deemed non-responsive and will not be evaluated.

### 2. FIRM PRICE

Bidder tendered all-inclusive firm price to perform the work is Canadian funds, applicable taxes excluded. Any Travel and Living Expenses and other miscellaneous expenses must be included in the firm price.

| DESCRIPTION   | FIRM PRICE<br>(applicable taxes<br>excluded) |
|---|--|
| To perform the work as specified in Annex A – Statement of Work   | \$ _____                                     |
| <b>Total Firm Price for Financial Proposal Evaluation (taxes extra):<br/>(NOT TO EXCEED \$150,000.00 Taxes extra)</b> | \$ _____                                     |