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**K1A 0S5**

**Bid Fax: (819) 997-9776**

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

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

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

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

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

**Comments - Commentaires**

<b>Title - Sujet</b> NCR Roadmap Low-Carbon Operations	
<b>Solicitation No. - N° de l'invitation</b> EP021-180416/A	<b>Date</b> 2018-06-06
<b>Client Reference No. - N° de référence du client</b> 20180416	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$ZQ-018-33604	
<b>File No. - N° de dossier</b> 018zq.EP021-180416	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2018-07-17</b>	<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Aubert, Olivier	<b>Buyer Id - Id de l'acheteur</b> 018zq
<b>Telephone No. - N° de téléphone</b> (613) 858-8062 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA PAYMENTS IN LIEU OF TAXES (PILT) LAURIER STREET Gatineau Quebec K1A 0S5 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

**Vendor/Firm Name and Address**

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

**Issuing Office - Bureau de distribution**

Services Procurement-Instruments Management  
Division/Approvisionnement de services-Gestion des  
instruments

Terrasses de la Chaudière 5th Floor

10 Wellington Street

Gatineau

Quebec

K1A 0S5

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

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## TITLE

Roadmap for Low-Carbon Federal Operations in the National Capital Region (NCR)

## 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 and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial 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 the Pricing Schedule, Technical and Financial Criteria, Additional Certifications Required Precedent to Contract Award.

The Annexes include the Statement of Work, Basis of Payment, Security Requirements Check List, and Task Authorization Form.

### 1.2 Summary

1.2.1 The Department of Public Works and Government Services Canada requires, on behalf of the Real Property Services, the development of a Roadmap to move to low carbon government operations for the National Capital Area (Roadmap) that will inform and align legislative policy amongst different levels of government, guide capital investment decisions and serve as valuable input into the establishment of incentive structures to revolutionize the operations of the Federal Government in the National Capital Area (Ottawa and Gatineau).

The proposed period of contract shall be from contract award date to 2 years later.

1.2.2 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), the

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Buyer ID - Id de l'acheteur  
018ZQ  
CCC No./N° CCC - FMS No./N° VME

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Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA).

1.2.3 The resulting contract will not include deliveries of services within locations within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirements for deliveries of services within locations within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to CLCAs will have to be treated as a separate procurement not forming part of the bid solicitation.

### **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) (<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.

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

Delete: 60 days

Insert: 120 calendar days.

### **2.2 Submission of Bids**

Bids must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated on page 1 of the bid solicitation. Bids transmitted to PWGSC by electronic mail will not be accepted."

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

### **2.3 Former Public Servant**

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPS, bidders must provide in writing before contract award for each question below, the answer and, as applicable, the information required.

If the Contracting Authority has not received the answer to the question and, as applicable, the information required by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the answer and, as applicable, the information required. 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,

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"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; and
- (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; and
  - g) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction 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.

#### **2.4 Inquiries - Bid Solicitation**

All enquiries must be submitted in writing to the Contracting Authority no later than 7 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.

#### **2.5 Applicable Laws**

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

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

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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 [ 3 hard copies and 1 soft copy on USB];  
Section II: Financial Bid [ 1 hard copy and 1 soft copy on USB];  
Section III: Certifications [1 hard copy and 1 soft copy on USB]; and  
Section IV: Additional Information [1 hard copy and 1 soft copy on USB];

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

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

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

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

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](#).

To assist Canada in reaching its objectives, bidders should:

1. use paper containing fiber certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
2. use an environmentally-preferable format including black and white printing instead of color printing, printing double sided/duplex, using staples or clips instead of cerlox, duo tangs or binders.

#### 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

- A. Bidders must submit their financial bid in Canadian funds and in accordance with the pricing schedule detailed in Attachment 1 to Part 3.

- 
- B.** Bidders must submit their prices and rates FOB destination; Canadian customs duties and excise taxes included, as applicable; and Applicable Taxes excluded.
- C.** When preparing their financial bid, Bidders should review clause 4.1.2, Financial Evaluation, of Part 4 of the bid solicitation; and article 7.6, Payment, of Part 7 of the bid solicitation.

### **Section III: Certifications**

In Section III of their bid, bidders should provide the certifications required under Part 5 and, as applicable, any associated additional information.

### **Section IV: Additional Information**

In Section IV of their bid, bidders should provide:

1. their legal name;
2. their Procurement Business Number (PBN);
3. the name of the contact person (provide also 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;
4. for Part 2, article 2.3, Former Public Servant, of the bid solicitation: the required answer to each question; and, if the answer is yes, the required information;
5. for Part 6, article 6.1, Security Requirement, of the bid solicitation:
  - a) for each individual who will require access to classified or protected information, assets or sensitive work sites:
    - 1) the name of the individual;
    - 2) the date of birth of the individual; and
    - 3) if available, information confirming the individual meets the security requirement as indicated in Part 7 - Resulting Contract Clauses;

## ATTACHMENT 1 TO PART 3, PRICING SCHEDULE

The Bidder must complete this pricing schedule and include it in its financial bid.

<b>Milestone</b>			<b>Firm Price</b>
Stage 1			
Stage 2			
Stage 3			
Stage 4			
Stage 5			
Stage 6			
Sub-Total of Stages 1 to 6			
Stage 7	All-inclusive fixed daily rate (a)	Level of Effort* (b)	(a) x (b) = c
Junior Consultant		200 days	
Intermediate Consultant		200 days	
Senior Consultant		200 days	
Sub-Total of Stage 7			
<b>Evaluated Price (P) = (Sub-Total of Stages 1 to 6) + (Sub-Total of Stage 7)</b>			

\*The volumetric data included in this pricing schedule are provided for bid evaluated price determination purposes only. They are not to be considered as a contractual guarantee. Their inclusion in this pricing schedule does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.

The prices included in Stages 1 to 6 include any cost of travel and living expenses that may need to be incurred in the performance of the work described Annex A of Part 7 of the bid solicitation.

The rates included in Stage 7 exclude the total estimated cost of the authorized travel and living expenses that may need to be incurred for the work to be performed under the Contract on an "as and when requested basis

Under any resulting contract, Canada will not accept travel and living expenses that may need to be incurred by the contractor for any relocation of resources required to satisfy its contractual obligations.

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## PART 4 – EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.

An evaluation team composed of representatives of Canada will evaluate the bids.

#### 4.1.1 Technical Evaluation

##### 4.1.1.1 Joint Venture Experience

- a) Where the Bidder is a joint venture with existing experience as that joint venture, it may submit the experience that it has obtained as that joint venture.

Example: A bidder is a joint venture consisting of members L and O. A bid solicitation requires that the bidder demonstrate experience providing maintenance and help desk services for a period of 24 months to a customer with at least 10,000 users. As a joint venture (consisting of members L and O), the bidder has previously done the work. This bidder can use this experience to meet the requirement. If member L obtained this experience while in a joint venture with a third party N, however, that experience cannot be used because the third party N is not part of the joint venture that is bidding.

- b) A joint venture bidder may rely on the experience of one of its members to meet any given technical criterion of this bid solicitation.

Example: A bidder is a joint venture consisting of members X, Y and Z. If a solicitation requires: (a) that the bidder have 3 years of experience providing maintenance service, and (b) that the bidder have 2 years of experience integrating hardware with complex networks, then each of these two requirements can be met by a different member of the joint venture. However, for a single criterion, such as the requirement for 3 years of experience providing maintenance services, the bidder cannot indicate that each of members X, Y and Z has one year of experience, totaling 3 years. Such a response would be declared non-responsive.

- c) Joint venture members cannot pool their abilities with other joint venture members to satisfy a single technical criterion of this bid solicitation. However, a joint venture member can pool its individual experience with the experience of the joint venture itself. Wherever substantiation of a criterion is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. If the Bidder has not identified which joint venture member satisfies the requirement, the Contracting Authority will provide an opportunity to the Bidder to submit this information during the evaluation period. If the Bidder does not submit this information within the period set by the Contracting Authority, its bid will be declared non-responsive.

Example: A bidder is a joint venture consisting of members A and B. If a bid solicitation requires that the bidder demonstrate experience providing resources for a minimum number of 100 billable days, the bidder may demonstrate that experience by submitting either:

- Contracts all signed by A;
- Contracts all signed by B; or
- Contracts all signed by A and B in joint venture, or
- Contracts signed by A and contracts signed by A and B in joint venture, or
- Contracts signed by B and contracts signed by A and B in joint venture.

that show in total 100 billable days.

- d) Any Bidder with questions regarding the way in which a joint venture bid will be evaluated should raise such questions through the Enquiries process as early as possible during the bid solicitation period.

#### **4.1.1.2 Mandatory Technical Criteria**

Refer to Attachment 1 to Part 4.

#### **4.1.1.3 Point Rated Technical Criteria**

Refer to Attachment 1 to Part 4. Point-rated technical criteria not addressed will be given a score of zero.

### **4.1.2 Financial Evaluation**

4.1.2.1 For bid evaluation and Contractor selection purposes only, the evaluated price of a bid will be determined in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3.

#### **4.1.2.2 Mandatory Financial Criteria**

Refer to Attachment 1 to Part 4.

## **4.2 Basis of Selection**

### **4.2.1. Basis of Selection – Highest Combined Rating of Technical Merit [70%] and Price [30%]**

4.2.1.1 To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation;
- (b) meet all the mandatory evaluation criteria; and
- (c) obtain the required minimum number of points specified in Attachment 1 to Part 4 for the point rated technical criteria.

4.2.1.2 Bids not meeting 4.2.1.1 (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid obtaining the highest number of points nor the one with the lowest evaluated price will necessarily be accepted.

4.2.1.3 The lowest evaluated price (LP) of all responsive bids will be identified and a pricing score (PS), determined as follows, will be allocated to each responsive bid (i):  $PS_i = LP / P_i \times 30$ .  $P_i$  is the evaluated price (P) of each responsive bid (i).

4.2.1.4 A technical merit score (TMS), determined as follows, will be allocated to each responsive bid (i):  $TMS_i = OS_i \times 70$ .  $OS_i$  is the overall score (OS) obtained by each responsive bid (i) for all the point rated technical criteria specified in Attachment 1 to Part 4, determined as follows: total number of points obtained / maximum number of points available.

4.2.1.5 The combined rating (CR) of technical merit and price of each responsive bid (i) will be determined as follows:  $CR_i = PS_i + TMS_i$ .

4.2.1.6 The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract. In the event two or more responsive bids have the same

highest combined rating of technical merit and price, the responsive bid that obtained the highest overall score for all the point rated technical criteria detailed in Attachment 1 to Part 4 will be recommended for award of a contract.

4.2.1.7 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 the technical merit and price, respectively.

<b>Basis of Selection - Highest Combined Rating of Technical Merit (70%) and Price (30%)</b>			
<b>Bidder</b>	<b>Bidder 1</b>	<b>Bidder 2</b>	<b>Bidder 3</b>
<b>Overall Score for All the Point Rated Technical Criteria</b>	OS1: 120/135	OS2: 98/135	OS3: 82/135
<b>Bid Evaluated Price</b>	P1: C\$60,000	P2: C\$55,000	<b>LP</b> and P3: C\$50,000
<b>Calculations</b>	<b>Technical Merit Score (OS<sub>i</sub> x 70)</b>	<b>Pricing Score (LP/P<sub>i</sub> x 30)</b>	<b>Combined Rating</b>
<b>Bidder 1</b>	120/135 x 70 = 62.22	50/60 x 30 = 25	87.22
<b>Bidder 2</b>	98/135 x 70 = 50.81	50/55 x 30 = 27.27	78.08
<b>Bidder 3</b>	82/135 x 70 = 42.52	50/50 x 30 = 30.00	72.52

## ATTACHMENT 1 TO PART 4, TECHNICAL AND FINANCIAL CRITERIA

### Mandatory Technical Criteria

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.

Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

<b>Mandatory Technical Criteria (MT)</b>		
<b>The Bidder</b>		
<b>Experience</b>		
<b>Number</b>	<b>Mandatory Technical Criterion</b>	<b>Bid Preparation Instructions</b>
<b>MT1</b>	<p>The Contractor must have recognition as a leader in working with governments to address climate change and facilitate the transformation of societies to smart, sustainable, digital economies.</p> <p>Recognition includes recent and relevant experience in providing related advisory services and reports to governments;</p>	
<b>MT2</b>	<p>The Contractor must have demonstrated recent and extensive experience and expertise in evaluating and assessing global trends related to sustainable community development to reduce carbon footprint in all aspects of the digital, infrastructure, logistics, transportation, utility and common services elements of communities.</p> <p>Recent experience is defined as providing plans/studies/reports to governments on specific measures to guide their achievement of a sustainable low carbon footprint using innovative practices, technology, capacity and capability.</p> <p>Recent experience is defined as developing and delivering at least 3 such transformative and comprehensive plans to governments over the last 10 years.</p> <p>Government is defined as municipal, regional, provincial / state or national governments;</p>	
<b>Tools</b>		
<b>Number</b>	<b>Mandatory Technical Criterion</b>	<b>Bid Preparation Instructions</b>
<b>MT3</b>	<p>The Contractor must possess proven comprehensive analytical processes, tools or systems that support the work to be performed;</p>	

<b>MT4</b>	In support of these tools or systems, the Contractor must possess a developed, comprehensive and current database of plans/studies/reports/books on the impact of scientific and technological changes on the economy, the workforce, society and the environment that have been prepared by the Contractor and accepted for implementation by the governments for whom they were produced;
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**Point Rated Technical Criteria**

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

<b><i>Evaluation Description</i></b>	<b><i>% of Points Earned</i></b>	<b><i>Point Earned for:</i></b>	
		<b><i>Up to 40 Points Elements</i></b>	<b><i>Up to 70 Points Elements</i></b>
Proposal provides an excellent or highly innovative approach or methodology; experience and network and communication are exceptional	100%	40	70
Proposal provides a very good approach or methodology; demonstrates high level of experience or network and communication	75%	30	52.5
Proposal addresses the requirement but provides a minimally acceptable approach or methodology only; experience exists but is marginal	50%	20	35
Proposal addresses the requirement but not in an acceptable manner; experience examples do not demonstrate a full grasp of the issues to be addressed	25%	10	17.5
Not addressed in proposal or approach or methodology is totally unacceptable; experience is not related to the work requirement	0%	0	0

Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

Bidders must describe the manner in which the Proposal satisfies the Point Rated Technical Criteria (40 pages maximum). The Bidder may use links to direct evaluators to referenced reports; the referenced reports will not be counted in the page maximum for this part of the Proposal.

<b>Point Rated Technical Criteria (RT) and Scores</b>		<b>Minimum Number of Points</b>	<b>Maximum Number of Points</b>
<b>Approach / Methodology</b>			
<b>RT1</b>	The Bidder's proposal will be evaluated as follows:	28	40

	<ul style="list-style-type: none"> <li>• A proposed work plan and schedule describing how the Bidder will meet the requirements of the SOW (up to 10 points).</li> <li>• The workplan will offer creative/original options to meet the requirements of the SOW (up to 10 points).</li> <li>• The plan will include a detailed approach as to how the Bidder utilized qualitative and quantitative data in the development of the previous studies (up to 20 points).</li> </ul>		
<b>Experience</b>			
<b>RT2</b>	<p>Experience working with governments at the municipal, regional, provincial / state and/or federal level, involved in industry-related economy-wide horizontal issues.</p> <ul style="list-style-type: none"> <li>• The Bidder shall provide a minimum of three (3) previous reports that demonstrate its experience in leading, developing and submitting similar studies (up to 20 points each).</li> <li>• The Bidder must provide details on past work with industry to obtain feedback and show a clear linkage to tasks and activities in the SOW (up to 10 points).</li> </ul>	49	70
<b>Network / Communication</b>			
<b>RT3</b>	<p>The proposal should demonstrate the following:</p> <ul style="list-style-type: none"> <li>• National and/or international reach from the network of contacts to be draw upon for the delivery of the work. (up to 10 points).</li> <li>• Ability to design, refine and recommend visuals and narratives and recommended options based on completed studies (up to 20 points).</li> <li>• Ability to design, propose and validate the resonance and efficacy of longer-term sustainment of messaging and visuals with industry and government and refine them accordingly (up to 10 points).</li> </ul>	28	40
<b>Overall Score</b>		105	150

**Mandatory Financial Criteria**

Bids must meet the mandatory financial criteria specified in the table inserted below.

Bids which fail to meet the mandatory financial criteria will be declared non-responsive. Each criterion should be addressed separately.

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<b>Mandatory Financial Criteria (MF)</b>		
<b>Number</b>	<b>Mandatory Financial Criterion</b>	<b>Bid Preparation Instructions</b>
<b>MF1</b>	The Evaluated Price (P) must not exceed \$2,000,000.00 (Applicable Taxes extra).  Evaluated Price (P) exceeding this amount will be considered non-responsive.	

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## 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. Unless specified otherwise, 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 and Additional Information Required with the Bid

#### 5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the [Integrity Provisions of the Standard Instructions](http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html), all bidders must provide with their bid, if applicable, the Integrity declaration form available on the Forms for the Integrity Regime website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

#### 5.1.2 Additional Certifications Required with the Bid

The Bidder must provide with its bid the required additional certifications included in Attachment 1 to Part 5, Additional Certifications Required with the Bid.

### 5.2 Certifications and Information Required Precedent to Contract Award

The required certifications and additional information below should be submitted with the bid but may be submitted afterwards. If the required certifications and additional information are not submitted with the bid, the Contracting Authority will inform the Bidder of a time frame within which they must be submitted by the Bidder. Failure to provide the required certifications and additional information within the time frame specified will render the bid non-responsive.

#### 5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real procurement agreement of the [Ineligibility and Suspension Policy](http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

#### 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" available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](http://www.esdc.gc.ca/employment-social-development) website

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(<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>).

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.

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "FCP Limited Eligibility to Bid List" during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed Federal Contractors Program for Employment Equity certification before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority before contract award with a completed Federal Contractors Program for Employment Equity certification for each member of the Joint Venture. Attachment 1 to Part 5, Additional Certifications Precedent to Contract Award, includes a copy of the certification to provide.

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## ATTACHMENT 1 TO PART 5, ADDITIONAL CERTIFICATIONS REQUIRED PRECEDENT TO CONTRACT AWARD

### 1. Federal Contractors Program For Employment Equity - Certification

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with any request or requirement imposed by Canada may render the bid non-responsive or constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit the [Employment and Social Development Canada \(ESDC\) - Labour's website](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html) (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html>).

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

Instructions to the Bidder: Complete both A and B.

#### A. Instructions to the Bidder: Check only one of the following:

- A1. The Bidder certifies having no work force in Canada.
- A2. The Bidder certifies being a public sector employer.
- A3. The Bidder certifies being a [federally regulated employer](#) being subject to the [Employment Equity Act](#).
- A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and / or permanent part-time employees.
- A5. The Bidder certifies having a combined workforce in Canada of 100 or more permanent full-time and/or permanent part-time employees.
- A5.1. The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

or

- A5.2. The Bidder certifies having submitted the [Agreement to Implement Employment Equity \(LAB1168\)](#) to ESDC-Labour. **As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.**

#### B. Instructions to the Bidder: Check only one of the following:

- B1. The Bidder is not a Joint Venture.

or

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- ( ) B2. The Bidder is a Joint venture. Instructions to the Bidder: Refer to the Joint Venture section of the Standard Instructions. If the Bidder is a Joint Venture, it must provide the Contracting Authority before contract award with a completed Federal Contractors Program for Employment Equity certification for each member of the Joint Venture.

## PART 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS

### 6.1 Security Requirement

6.1.1 Before award of a contract, the following conditions must be met:

- a. the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
- b. the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirement as indicated in Part 7 - Resulting Contract Clauses;
- c. the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;

If the information is not provided in or with the bid, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.)

6.1.2 Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.

6.1.3 For additional information on security requirements, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html> ) website.

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## 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 in Annex A.

#### 7.1.1 Task Authorization

**A.** Work described at Annex A, Statement of Work, under Stage 7 will be performed under the Contract on an “as and when requested basis”.

**B.** With respect to the Work mentioned under paragraph A of this clause,

1. an obligation will come into force only when the Contractor receives a Task Authorization (TA), inclusive of any revisions, authorized and issued in accordance with this clause, and only to the extent designated in the authorized TA;
2. the TA Authority and limit will be determined in accordance with paragraph C of this clause;
3. the Contractor must not commence work until a TA, inclusive of any revisions, has been authorized and issued in accordance with the Contract. The Contractor acknowledges that work performed before a TA, inclusive of any revisions, has been authorized and issued in accordance with the Contract will be done at the Contractor's own risk and expense;
4. the task description, inclusive of any revisions, included in an authorized TA must fall within the scope of the Statement of Work, in Annex A under Stage 7; and
5. the TA, inclusive of any revisions, will be authorized under the Contract through the use of Annex D, Task Authorization Form. An authorized TA is a completed Annex D signed by the TA Authority.

#### C. TA Authority and Limit

The Project Authority may authorize individual TAs inclusive of any revisions up to a limit of \$250,000.00, Applicable Taxes extra. Any TA the total value of which would exceed that limit or any revision to a previously authorized TA that would increase the TA total value above that limit must be authorized by the Contracting Authority before issuance to the Contractor."

**D.** The authority specified under paragraph C of this clause is granted subject to the sum specified in the Contract under clause 7.6.2 (Canada's Total Liability, Portion of the Work - Cumulative Total of all authorized TAs,) not being exceeded.

#### E. TA Process

For each task or revision of a previously authorized task, the Project Authority will provide the Contractor with a request to perform a task prepared using Annex D, Task Authorization Form containing as a minimum:

- 
- the task or revised task description of the Work required, including:
    - the details of the activities or revised activities to be performed;
    - a description of the deliverables or revised deliverables to be submitted; and
    - a schedule or revised schedule indicating completion dates for the major activities or submission dates for the deliverables, or both, as applicable;
  - the Contract security requirements applicable to the task or revised task;
  - the Contract basis (bases) of payment applicable to the task or revised task; and
  - the Contract method(s) of payment applicable to the task or revised task and, as applicable, the associated schedule of milestones.

**F.** Within 7 calendar days of its receipt of the request, the Contractor must provide the Project Authority with a signed and dated response prepared and submitted using the TA form received from the Project Authority, containing as a minimum:

1. the total estimated cost proposed for performing the task or, as applicable, revised task;
2. a breakdown of that cost in accordance with Annex B, to be provided, as applicable, per milestone contained in the Schedule of Milestones ;
3. and; for each resource proposed by the Contractor for the performance of the Work required:

the name of the proposed resource;  
the resume of the proposed resource; and  
a demonstration that the proposed resource meets :  
the Contract security requirements.

**G.** TA Authorization

1. The TA Authority will authorize the TA based on:
  - the request submitted to the Contractor pursuant to paragraph E of this clause;
  - the Contractor's response received, submitted pursuant to paragraph F of this clause; and
  - the agreed total estimated cost for performing the task or, as applicable, revised task and, as applicable, the breakdown of that cost per milestone contained in the Schedule of Milestones.
2. The TA Authority will authorize the TA provided that each resource proposed by the Contractor for the performance of the Work required meets all the requirements specified under paragraph G.3 of this clause.
3. The authorized TA will be issued to the Contractor by email (as an email attachment in PDF format).

**J.** Periodic Usage Reports - Contracts with TAs

1. The Contractor must compile and maintain detailed and current data on its performance of Work required and requested under TAs (inclusive of any revisions) authorized and issued under the Contract.
2. No later than 15 calendar days after the end of each of the reporting periods below, the Contractor must submit to the Contracting Authority and Project Authority a periodic usage report containing, in an electronic spreadsheet (such as MSOffice Excel), the data elements specified in

paragraphs J.3 and J.4 of this clause in the order they are presented. Where at the end of a reporting period, no changes are required to be made to the data contained in the periodic usage report submitted for the previous period, the Contractor must submit a "NIL" report to the Contracting Authority and Project Authority.

The reporting periods are defined as follows:

1st quarter: April 1 to June 30;  
2nd quarter: July 1 to September 30;  
3rd quarter: October 1 to December 31; and  
4th quarter: January 1 to March 31.

3. For each TA authorized and issued under the Contract, the data must contain the following data elements in the order presented:

- the TA number appearing on the TA form;
- the date the task was authorized appearing on the TA form;
- the total estimated cost of the task (Applicable Taxes extra) before any revisions appearing on the TA form;
- the following information appearing on the TA form must be included for each authorized revision, starting with revision 1, than 2, etc:
  - the TA revision number;
  - the date the revision to the task was authorized;
  - the authorized increase or decrease (Applicable Taxes extra);
  - the total estimated cost of the task (Applicable Taxes extra) after authorization of the revision;
  - the total cost incurred for the task (as last revised, as applicable), Applicable Taxes extra;
  - the total cost incurred and invoiced for the task (as last revised, as applicable), Applicable Taxes extra;
  - the total amount of Applicable Taxes invoiced;
  - the total amount paid, Applicable Taxes included;
  - the start and completion date of the task (as last revised, as applicable); and
  - the active status (i.e., the percentage of the work completed) of the task (as last revised, as applicable) with an explanation (as applicable).

4. For all TAs authorized and issued under the Contract, the data must contain the following data elements in the order presented:

- the sum (Applicable Taxes extra) specified in clause 7.6.2, Canada's Total Liability, Portion of the Work - Cumulative Total of all Authorized TAs , as last amended;
- the total cost incurred for all authorized tasks inclusive of any revisions, Applicable Taxes extra;
- the total cost incurred and invoiced for all authorized tasks inclusive of any revisions, Applicable Taxes extra;
- the total amount of Applicable Taxes invoiced for all authorized tasks inclusive of any revisions; and
- the total amount paid for all authorized tasks inclusive of any revisions, Applicable Taxes extra.

## 7.2 Standard Clauses and Conditions

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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) (<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

2035 (2016-04-04), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

### 7.2.2 SACC Manual Clause 4006 (2010-08-16) Contractor to Own Intellectual Property Rights in Foreground Information

### 7.2.3 Inspection and Acceptance

The Project Authority is the Inspection Authority. All reports, deliverable items, documents, goods and all services rendered under the Contract are subject to inspection by the Inspection Authority or representative. Should any report, document, good or service not be in accordance with the requirements of the Statement of Work and to the satisfaction of the Inspection Authority, as submitted, the Inspection Authority will have the right to reject it or require its correction at the sole expense of the Contractor before recommending payment.

## 7.3 Security Requirement

7.3.1 The following security requirement (SRCL and related clauses provided by the [Contract Security Program](#)) apply and form part of the Contract:

- a. The Contractor must, at all times during the performance of the Contract, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), **Public Works and Government Services Canada (PWGSC)**.
- b. The Contractor personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by CISD/PWGSC.
- c. The Contractor MUST NOT remove any PROTECTED information or assets from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
- d. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
- e. The Contractor must comply with the provisions of the:
  - i. Security Requirements Check List, attached at Annex C;
  - ii. *Industrial Security Manual* (Latest Edition).

7.3.2 The Company Security Officer (CSO) must ensure through the [Contract Security Program](#) that the Contractor and proposed individuals hold a valid security clearance at the required level.

## 7.4 Term of Contract

### 7.4.1 Period of the Contract

The period of the Contract is from date of Contract to two (2) years later.

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## 7.4.2 Termination on Thirty Days Notice

Canada reserves the right to terminate the Contract at any time in whole or in part by giving thirty (30) calendar days written notice to the Contractor.

In the event of such termination, Canada will only pay for costs incurred for services rendered and accepted by Canada up to the date of the termination. Despite any other provision of the Contract, there will be no other costs that will be paid to the Contractor as a result of the termination.

## 7.4.3 Comprehensive Land Claims Agreements (CLCAs)

The Contract does not include deliveries of services within locations within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirements for deliveries of services within locations within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to CLCAs will have to form part of a separate contract.

## 7.5 Authorities

### 7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Olivier Aubert  
Title: Supply Team Leader  
Public Works and Government Services Canada  
Address: 10 Wellington  
Gatineau QC K1A 0S5  
Telephone: 613-858-8062  
E-mail address: olivier.aubert@pwgsc.gc.ca

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

### 7.5.2 Project Authority

The Project Authority for the Contract is: (Fill in at time of contract award.)

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.

### **7.5.3 Contractor's Representative**

(Fill in at time of contract award.)

## **7.6 Payment**

### **7.6.1 Basis of Payment**

#### **7.6.1.1 Firm Lot Price**

For the Work described in Annex A, Statement of Work under Stage 1 to Stage 6:

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm lot price in accordance with Annex B, Basis of Payment. Customs duty 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.

#### **7.6.1.2 Authorized TA**

##### **Firm Lot Price TA**

For the Work described in Annex A, Statement of Work under Stage 7:

In consideration of the Contractor satisfactorily completing all of its obligations under the authorized TA, the Contractor will be paid the firm lot price specified in the authorized TA, determined in accordance with the basis of payment in Annex B. 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 specified in the authorized TA, unless they have been authorized, in writing, by the Contracting Authority before their incorporation into the Work specified in the authorized TA.

##### **TA subject to a Ceiling Price**

For the Work described in Annex A, Statement of Work under Stage 7:

When the basis of payment specified in a TA authorized and issued under the Contract is a ceiling price, the Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work specified in the authorized TA, as determined in accordance with the basis of payment cost elements, in Annex B, to a ceiling price specified in the authorized TA.

The ceiling price is subject to downward adjustment so as not to exceed the actual costs reasonably incurred in the performance of the Work and computed in accordance with the Basis of Payment. Customs duty 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.

## **TA subject to a Limitation of Expenditure**

For the Work described in Annex A, Statement of Work under Stage 7:

The Contractor will be paid for its costs reasonably and properly incurred in the performance of the Work specified in the authorized TA in accordance with the basis of payment in Annex B to the limitation of expenditure specified in the authorized TA.

Canada's total liability to the Contractor under the authorized TA must not exceed the limitation of expenditure specified in the authorized TA. Customs duties are included and Applicable Taxes are extra.

No increase in the liability of Canada or in the price of the Work specified in the authorized TA resulting from any design changes, modifications or interpretations of the Work specified in the authorized TA will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been authorized, in writing, by the TA Authority before their incorporation into the Work specified in the authorized TA. 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 authorization of the TA Authority. The Contractor must notify the TA Authority in writing as to the adequacy of this sum:

- (a) when it is 75 percent committed, or
- (b) four (4) months before the final delivery date specified in the authorized TA, or
- (c) as soon as the Contractor considers that the authorized TA funds are inadequate for the completion of the Work specified in the authorized TA,

whichever comes first.

If the notification is for inadequate authorized TA funds, the Contractor must provide to the TA Authority, a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

### **7.6.2 Canada's Total Liability**

#### **Portion of the Work - Cumulative Total of all authorized TAs**

- A. With respect to the portion of the Work that is to be performed under the Contract on an "as and when requested basis", Canada's total liability to the Contractor under the Contract for all authorized TAs, inclusive of any revisions, must not exceed the sum of \$ \_\_\_\_\_ (insert amount at contract award). Customs duties are included and the Applicable Taxes are extra.
- B. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
- C. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
  - 1. when it is 75 percent committed, or
  - 2. four (4) months before the contract expiry date,
  - 3. as soon as the Contractor considers that the sum is inadequate for the completion of the Work requested in all authorized TAs inclusive of any revisions, the applicable basis of payment of

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which is limitation of expenditure [contract clause 7.6.1.2, TA subject to a Limitation of Expenditure],

whichever comes first.

- D. 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.

### **7.6.3 Method of Payment**

#### **Milestone Payments - Not subject to holdback**

For the Work described in Annex A, Statement of Work under Stage 1 to Stage 6:

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a. an accurate and complete claim for payment using PWGSC-TPSGC 1111, Claim for Progress Payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all the certificates appearing on form PWGSC-TPSGC 1111 have been signed by the respective authorized representatives;
- c. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

#### **Single Payment**

For the Work described in Annex A, Statement of Work under Stage 7:

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.

#### **Progress Payments**

For the Work described in Annex A, Statement of Work under Stage 7:

Canada will make progress payments in accordance with the payment provisions of the Contract, no more than once a month, for cost incurred in the performance of the Work, up to 100 percent of the amount claimed and approved by Canada if:

- a. an accurate and complete claim for payment using form [PWGSC-TPSGC 1111](#), Claim for Progress Payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. the amount claimed is in accordance with the basis of payment;
- c. the total amount for all progress payments paid by Canada does not exceed 100 percent of the total amount to be paid under the Contract;

- 
- d. all certificates appearing on form [PWGSC-TPSGC 1111](#) have been signed by the respective authorized representatives.

Progress payments are interim payments only. Canada may conduct a government audit and interim time and cost verifications and reserves the rights to make adjustments to the Contract from time to time during the performance of the Work. Any overpayment resulting from progress payments or otherwise must be refunded promptly to Canada.

### Monthly Payment

For the Work described in Annex A, Statement of Work under Stage 7:

Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice 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 performed has been accepted by Canada.

### 7.6.4 SACC Manual Clauses

C2000C, (2007-11-30) Taxes - Foreign-based Contractor

### 7.7 Invoicing Instructions

#### 7.7.1 Progress Payment Claim - Supporting Documentation not required

In the case of a milestone payment or a progress payment, the Contractor must submit a claim for payment using form [PWGSC-TPSGC 1111](#), Claim for Progress Payment.

Each claim must show:

- a. all information required on form [PWGSC-TPSGC 1111](#);
- b. all applicable information detailed under the section entitled "Invoice Submission" of the general conditions;

Applicable Taxes, must be calculated on the total amount of the claim before the holdback is applied. At the time the holdback is claimed, there will be no Applicable Taxes payable as it was claimed and payable under the previous claims for progress payments.

The Contractor must prepare and certify one original and two (2) copies of the claim on form [PWGSC-TPSGC 1111](#), and forward it to the Project Authority identified under the section entitled "Authorities" of the Contract for appropriate certification after inspection and acceptance of the Work takes place.

The Project Authority will then forward the original and two (2) copies of the claim to the Contracting Authority for certification and onward submission to the Payment Office for the remaining certification and payment action.

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The Contractor must not submit claims until all work identified in the claim is completed.

## 7.8 Certifications and Additional Information

### 7.8.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

### 7.8.2 Federal Contractors Program for Employment Equity - Default by the Contractor

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid List" available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>). The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

## 7.9 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in \_\_\_\_\_. (insert the name of the province or territory as specified by the Bidder in its bid, if applicable.)

### 7.10 Priority of Documents

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

- a) the Articles of Agreement;
- b) the general conditions 2035 (2016-04-04), General Conditions - Higher Complexity - Services;
- c) Annex A, Statement of Work;
- d) Annex B, Basis of Payment;
- e) Annex C, Security Requirements Check List;
- f) the signed Task Authorizations (including all of its annexes, if any); and
- g) the Contractor's bid dated \_\_\_\_\_ (Insert the date (year-month-day) of the bid. if the bid was clarified or amended, at time of contract award, add, as applicable: ", as clarified on \_\_\_\_\_ (year-month-day)" "and" ", as amended on \_\_\_\_\_(year-month-day).)

### 7.11 Insurance - No Specific Requirement

SACC Manual clause G1005C (2016-01-28), Insurance - No Specific Requirement

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## ANNEX A, STATEMENT OF WORK

### 1 OVERVIEW

The evolution of digital technologies, smart buildings and the way the public service works and delivers services affects the management of federal assets in the National Capital Region (NCR) and provides opportunities for enhancements. In particular, these advances can lead to smart, low-carbon federal government operations.

A critical requirement exists for the development of a strategy that will inform and align federal policy development and guide capital investment decisions and operations. The strategy will serve as a Roadmap for reducing the carbon footprint of government operations within Federal buildings, Federally-occupied leased facilities and Federal lands in the National Capital Region (NCR).

### 2 BACKGROUND

Moving to low-carbon government operations is a high priority Government initiative. New paradigms in energy management, infrastructure, mobility and communications exist and can be applied to Federal assets and associated operations in the NCR, leading to smart, low-carbon federal government operations. Canada's climate change obligations and national objectives demand a significant shift in approaches and activities to allow it to be a leader in the sustainable, post-carbon era.

In the NCR, Public Services and Procurement Canada (PSPC) manage major real property and real estate initiatives that see billions of dollars invested in new and existing infrastructure. Planned future investments in infrastructure can be a catalyst to a successful transition to low-carbon operations. PSPC's intentions related to infrastructure are guided by three related plans:

- PSPC National Carbon-Neutral Portfolio Plan
- 2016-2019 Federal Sustainable Development Strategy
- Treasury Board Secretariat Greening Government Strategy

### 3 EXISTING DOCUMENTS

There are a number of existing documents which may be of use to bidders including:

#### List of Annexes

Annex A – List of Federal Facilities in the NCR to be considered from the Directory of Federal Real Property<sup>1</sup>: <https://www.tbs-sct.gc.ca/dfrp-rbif/home-accueil-eng.aspx>



EN\_PSPC National  
Carbon Neutral Port

Annex B – PSPC National Carbon-Neutral Portfolio Plan

Annex C – 2016-2019 Federal Sustainable Development Strategy <http://fsds-sfdd.ca/index.html#/en/goals/>

Annex D - TBS Greening Government Strategy:

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<sup>1</sup> The Directory of Federal Real Property is referenced as a source document for assets to be considered. It must be reviewed to determine what, if any, assets are to be excluded from consideration.

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<https://www.canada.ca/en/treasury-board-secretariat/services/innovation/greening-government/strategy.html>

## 4 OBJECTIVE

The objective of the Roadmap is to review government operations in Federal buildings and leased assets and lands in the NCR and determine the measures required to reduce the associated carbon footprint. An integrated, future-focused Roadmap that builds on past plans and identifies new approaches can guide policy-makers and legislators in the medium and longer terms.

## 5 SCOPE & APPROACH

To accomplish this vision, PSPC requires the services of a consultant with the experience, proven engagement approaches and a database of best practices to develop the Roadmap for a long-term, sustainable, low-carbon footprint for Federal operations in the NCR. The successful Contractor will:

- Review the Federal operations in the NCR assets identified in Annex A.
- Assess associated energy use and management, energy efficiency, renewable energy technologies, architecture, construction and real estate, engineering, information and communication technologies (ICT), power generation and utilities, and transport and logistics.
- Identify essential elements that have already been achieved in the NCR and components that have yet to be realized and must be established in order to implement the build-out and scale-up of an Internet of Things infrastructure that will guide the move to low-carbon Federal operations in the NCR.
- Liaise with Federal stakeholders in the NCR to understand the nature of their operations and determine ways in which associated carbon footprints can be reduced.
- Inform other interested parties of the analysis and its future potential. Such parties include cities, provinces, Indigenous communities, academia, industry and utilities.
- Develop and submit a Roadmap document that describes the short-term, mid-term, and long-term actions, based on the megatrends, to reduce the carbon impact of Federal operations in the NCR.
- Identify the roles and actions the federal government can take to provide leadership in decarbonizing the NCR federally occupied environment that could be replicated and applied to other Federal assets across the country.
- Develop and submit a Roadmap that lays out the vision and the pathway to transform Federal operations in the NCR, leading to smart, low-carbon operations, leveraging the Internet of Things (IoT) as well as the latest communication technologies.

## 6 PROJECT REQUIREMENTS

The Contractor will be responsible to perform the following activities:

- a) Participate in Governance Committee deliberations
  - a. A Senior Executive Steering Committee will lead this initiative, chaired by the Treasury Board Secretariat (TBS) and the Public Services and Procurement Canada (PSPC) Assistant Deputy Minister (ADM) of Real Property.
  - b. Broader stakeholder committees will be created to engage and inform key partners and provide expert advice.
  - c. The Contractor will participate in and brief committees as required.
- b) Inform other Stakeholders
  - a. Inform interested parties, such as other Federal departments, cities, provinces, Indigenous communities, academia, industry, utilities, etc., of the conduct and progress of the initiative as and when directed by the Governance Committee.

- c) Compile Data
  - a. Review data obtained from the federal government, other government reports and other sources related to energy use and energy efficiency, renewable energy technologies and plans, architecture, construction, real estate, engineering, information technology, power generation utilities and transportation and logistics.
  - b. Prepare a digital library of the data to allow easy access.
- d) Analyze Data
  - a. Prepare draft documents that outline work that can be done to achieve low-carbon operations in the NCR.
- e) Inform interested parties as requested by the Governance Committee
  - a. Initial information opportunities will take place in person and will include contact with senior representatives of the following:
    - i. Federal Government
    - ii. National Capital Commission
    - iii. City of Ottawa
    - iv. City of Gatineau
    - v. Province of Ontario
    - vi. Province of Quebec
    - vii. Indigenous communities
    - viii. University of Ottawa
    - ix. Carleton University
    - x. Hydro Ottawa
- f) Facilitate six (6) roundtable meetings for Federal communities of practice/interest
  - a. Produce outputs from the roundtables to inform the Governance Committee of stakeholders' issues, concerns, consensus with future plans.
  - b. Conduct Executive Seminar(s) to brief on progress to date, obtain input and confirm the next steps.
- g) Perform detailed assessments in the following areas and sub-areas, using the data obtained from Canada, the information collected and assembled from interviews and roundtables and the results generated from the modelling and assessment techniques identified in the Contractor's previous work experience:
  - a. Buildings
    - i. Institutional
    - ii. Industrial
    - iii. Performance standards/codes
    - iv. Incentives to reduce energy usage/carbon footprint in new and existing buildings
    - v. Building information modeling
  - b. Energy
    - i. Sources & Ownership
    - ii. Demand
    - iii. Regulatory Framework
    - iv. Renewable opportunities
    - v. Energy Clouds
    - vi. Application of the Universal Smart Energy Framework (USEF)
  - c. Mobility
    - i. Shared transportation opportunities
    - ii. Emission-free options
    - iii. Policy and regulatory framework
    - iv. Innovative Workplace Solutions opportunities
    - v. Economic incentives
  - d. Finance
    - i. Carbon pricing policies/regimes
    - ii. Disincentives for carbon use

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- iii. Blockchain opportunities
  - iv. Complementary financial mechanisms such as robo advisors, data vaults, complementary currencies and micro-financing
  - v. Facilitating the move to a smart economy hub
  - vi. Opportunities for governments to determine/develop/implement public policies to ease regulatory burden, improve smart economy skills and facilitate low carbon economic growth
  - e. Overall Economic Assessment
    - i. Using an appropriately scaled, industry recognized modelling system, conduct a circular economic analysis in the following areas:
      - 1. Sustainable supply
      - 2. Eco-design
      - 3. Industrial ecology
      - 4. Functional economy
      - 5. Responsible consumption
      - 6. Increase life cycles
      - 7. Recycling
  - h) Develop the cross-disciplinary final Roadmap for reducing the carbon footprint of Federal operations in the NCR.
    - a. The Roadmap will identify streams of activities to be addressed and the initiatives required to advance the potential of lowering the carbon footprint of activities in each of those streams.
    - b. The Roadmap will identify the collaborative efforts that can/must occur to facilitate the transformation of Federal operations in the NCR to a low carbon, internet of things economy.
    - c. Identify Innovation Scenarios.
    - d. Provide energy demand, energy saving, employment, investment and income benefits comparisons between the existing situation and the Innovation Scenarios identified.
  - i) Prepare a Final Roadmap
    - a. Submit the Roadmap
    - b. Brief the Governance Committee and other groups as determined by the Governance Committee

## 7 GOVERNMENT OF CANADA RESPONSIBILITIES

The Government of Canada is responsible for the following:

- a) Providing all relevant information, within thirty (30) days of signing of the contract.
- b) Ensuring Canada staff is available for consultations with the Contractor.
- c) Reviewing and providing comments on the interim report to the Contractor two (2) weeks after receipt of interim report.
- d) Reviewing and providing comments on the draft final report to the contractor two (2) weeks after receiving final report.
- e) Arranging for a time and location for briefings to committees and other groups.

## 8 CONTRACTOR RESPONSIBILITIES

The Contractor will be responsible for the following:

- a) Providing all labour, materials, accommodation, meeting spaces, equipment and transportation required to perform the work.
- b) Arranging for and providing all logistics and accommodations for interviews, consultations, roundtables and other meetings.
- c) Submission of a detailed project work plan and schedule.
- d) Submission of monthly project updates.
- e) Briefing the Governance Committee at the outset of the contract.

- f) Submission of a draft working document Roadmap.
- g) Providing in-person, bi-monthly briefings to the Governance Committee.
- h) Submitting the final Roadmap document.
- i) Briefing the Governance Committee on the final Roadmap.

## **9 PROJECT DELIVERABLES AND SCHEDULE**

### **Stage 1: Initial Briefings – One month**

- o Brief Governance Committee, as well as other groups determined by the Governance Committee, on approach, workplan and timelines.

### **Stage 2: Information Collection – Two months**

- o Gather data on Federal assets – age, design, energy use, energy efficiency, GHG, services rendered within facilities.
- o Assess communication and mobility challenges in government operations within the Federal stock and the NCR.
- o Gather information from sectors aligned to Federal assets, including utilities, renewable energy technology, architecture, construction, ICT, etc.

### **Stage 3: Opportunity Analysis – Three months**

- o Structure a document based on data gathered and identify key gaps and areas of focus required to move Federal assets and operations toward a smart low-carbon infrastructure.
- o Include input from interested parties such as: Federal departments, businesses, unions, Indigenous communities, civil organizations, and academia, S&T, and ICT sectors.
- o Ancillary issues, such as future energy, communications and transportation/mobility impact on the NCR, are to be taken into account.

### **Stage 4: Stakeholder Roundtables – Three months**

- o Conduct approximately five (5) on-site roundtable meetings focused on the transformation of Federal operations.
- o Conduct a sixth (6<sup>th</sup>) round table to focus on an economic analysis designed to quantify financial commitments and commercial benchmarks that are needed to support the transition.
- o Roundtable meetings will engage interested parties and include new business models, changing nature of employment and focus on how the Roadmap can capitalize on Ottawa/Gatineau's strengths such as the technology sector.

### **Stage 5: Construct the Roadmap for the Smart Management of Federal Assets in the NCR – Two months**

- o The Roadmap should describe the short-, medium- and long-term measures needed to achieve a successful transition to smart, low carbon Federal operations in the NCR.

### **Stage 6: Submission – One month**

- o The document will be formally presented to the Governance Committee, as well as other groups determined by the Governance Committee.

### **Stage 7: Task Authorization**

- o On an "as and when requested basis", the Contractor may be requested to perform any of the following functions:

- Additional briefings to the Governance Committee, as well as other groups determined by the Governance Committee.
- Further liaison with stakeholders, as requested by Canada.
- Additional study/analysis, as requested by Canada.
- Creation of initiative-specific plans, as requested by Canada.

## 10 FURTHER DEFINITION/DESCRIPTION OF DELIVERABLES

The minimum project deliverables the contractor will be responsible for include:

- a) Detailed Project Work Plan and Schedule
- b) Briefing to Governance Committee, as well as other groups determined by the Governance Committee
- c) Literature Review
- d) Situational Analysis
- e) Draft Strategy
- f) Interim Reports/Updates
- g) Final Roadmap document in English, to contain:
  - a. A title page
  - b. An executive summary
  - c. A table of contents
  - d. An introduction, including statement of objectives and description of the methodology
  - e. A situational analysis, including results of stakeholder consultations, the legal, socio-economic and environmental contexts, and a review of secondary research, as the framework for developing desired outcomes
  - f. A business plan for implementing the recommendations contained in the Roadmap
  - g. Appendices, including detailed summaries of stakeholder consultations
  - h. A bibliography

## 11 FINAL ROADMAP FORMAT AND CONTENTS

The required content of each major section is explained below:

### *Executive Summary*

A comprehensive executive summary that outlines the objectives, conduct and results of the initiative.

### *Introduction*

State the objectives of this study and describe its methodology.

### *Situational Analysis*

Provide the following analysis for each of the sectors analyzed (Buildings, Energy, Mobility, Industry, Finance and Overall Economic Assessment).

*Legislative Context:* A description of how current legislation, agreements, and policies will influence the initiative.

*Ecological Context:* An overview of the socio-economic situation in the region.

*Current Opportunities:* Quick-hit, easy to exploit opportunities.

*Future Opportunities:* Medium and longer term opportunities.

*International, National and Local Trends:* Identify activities in other government jurisdictions.

*Global Sustainable Trends:* Future trends from academia and science.

*Ongoing Strategies/Planning Processes:* Ways in which momentum can be sustained over the long term.

***Business Plans***

Provide a compendium of recommendations for the future and include, minimally, the following components:

- a) Reason for choosing this opportunity
- b) Challenges associated with the opportunity
- c) Description of the business model
- d) Possibilities for growth and expansion
- e) Markets – local, national and international
- f) Financial Analysis, including:
  - a. Required Investment
  - b. Operating costs
  - c. Potential revenues
- g) Risk Analysis

## ANNEX B, BASIS OF PAYMENT

### A- Contract Period (From date of Contract to two (2) years later)

During the period of the Contract, for Work performed in accordance with the Contract, the Contractor will be paid as specified below.

#### 1.0 Firm Lot Price

For the Work described in Annex A, Statement of Work under Stage 1 to Stage 6, the Contractor will be paid a firm lot price in accordance with the table below:

<b>Milestone</b>	<b>Firm Price</b>
Stage 1	
Stage 2	
Stage 3	
Stage 4	
Stage 5	
Stage 6	

**Total Cost of Firm Lot Price:** \$ \_\_\_\_\_ (insert amount at contract award)

#### 2.0 Professional Fees

For the Work described in Annex A, Statement of Work under Stage 7, the Contractor will be paid all inclusive fixed time rates as follows:

<b>Stage 7</b>	<b>All-inclusive fixed daily rate</b>
Junior Consultant	
Intermediate Consultant	
Senior Consultant	

For the purpose of this Contract, a day is defined as 7.5 hours of work, exclusive of meal breaks. Payment will be made for days actually worked, with no provision for annual leave, statutory holidays and sick leave. If time worked is more or less than a day, the all inclusive fixed daily rate must be prorated to reflect the actual time worked.

**Total Estimated Cost of Professional Fees:** \$ \_\_\_\_\_ (insert amount at contract award)

#### 3.0 Cost Reimbursable Expenses

##### 3.1 Authorized travel and living expenses for Work

For the Work described in Annex A, Statement of Work under Stage 7, the Contractor will be paid for its authorized travel and living expenses reasonably and properly incurred in the performance of the Work done, delivered or performed outside the National Capital Region (NCR) defined in the [National Capital Act \(R.S.C., 1985, c. N-4\)](http://laws-lois.justice.gc.ca/eng/acts/N-4/page-9.html#docCont), available on the Justice Website (<http://laws-lois.justice.gc.ca/eng/acts/N-4/page-9.html#docCont>), at cost, without any allowance for profit and administrative overhead, in

Solicitation No. - N° de l'invitation  
EP021-180416/A  
Client Ref. No. - N° de réf. du client  
20180416

Amd. No. - N° de la modif.  
File No. - N° du dossier  
018ZQ. EP021-180416

Buyer ID - Id de l'acheteur  
018ZQ  
CCC No./N° CCC - FMS No./N° VME

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accordance with the meal and private vehicle 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.

Canada will not accept travel and living expenses that may need to be incurred by the Contractor for any relocation of resources required to satisfy its contractual obligations.

All travel must have the prior authorization of the Project Authority.

The authorized travel and living expenses will be paid upon submission of an itemized statement supported by receipt vouchers. All payments are subject to government audit.

**3.0 Total Estimated Cost- Contract Period: \$ \_\_\_\_\_ (insert amount at contract award)**

## ANNEX C, SECURITY REQUIREMENTS CHECK LIST



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat EP128-180416
Security Classification / Classification de sécurité UNCLASSIFIED

### SECURITY REQUIREMENTS CHECK LIST (SRCL)

### LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Public Works and Government Services Canada	2. Branch or Directorate / Direction générale ou Direction Real Property	
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail NCA Roadmap to Non-Carbon Economy		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c.) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c.)		<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/> Not releasable / À ne pas diffuser <input type="checkbox"/> Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays:	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/> Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays:	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/> Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>



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**PART A (continued) / PARTIE A (suite)**

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?  
 Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?  No  Yes  
 Non  Oui  
 If Yes, indicate the level of sensitivity:  
 Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?  
 Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?  No  Yes  
 Non  Oui  
 Short Title(s) of material / Titre(s) abrégé(s) du matériel :  
 Document Number / Numéro du document :

**PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)**

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITE	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS			

Special comments:  
 Commentaires spéciaux : \_\_\_\_\_

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.  
 REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?  
 Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?  No  Yes  
 Non  Oui  
 If Yes, will unscreened personnel be escorted?  
 Dans l'affirmative, le personnel en question sera-t-il escorté?  No  Yes  
 Non  Oui

**PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)**

**INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS**

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?  
 Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?  No  Yes  
 Non  Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?  
 Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?  No  Yes  
 Non  Oui

**PRODUCTION**

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?  
 Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?  No  Yes  
 Non  Oui

**INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)**

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?  
 Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?  No  Yes  
 Non  Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?  
 Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?  No  Yes  
 Non  Oui



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**PART C - (continued) / PARTIE C - (suite)**

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.  
 Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.  
 Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

**SUMMARY CHART / TABLEAU RÉCAPITULATIF**

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET	NATO RESTRICTED NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÈS SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET TRÈS SECRET
											A	B	C			
Information / Assets Renseignements / Biens Production																
IT Media / Support TI																
IT Link / Lien électronique																

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?  
 La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?  No  Yes  
 Non  Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".  
 Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?  
 La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?  No  Yes  
 Non  Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).  
 Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

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Amd. No. - N° de la modif.  
 File No. - N° du dossier  
 018ZQ. EP021-180416

Buyer ID - Id de l'acheteur  
 018ZQ  
 CCC No./N° CCC - FMS No./N° VME

## ANNEX D, TASK AUTHORIZATION FORM

<b>Contract Number</b>		<b>EP021-180416</b>
<b>Task Authorization (TA) Number</b>		Instructions to the TA Authority: Enter the number here.
<b>Contractor's Name and Address</b>		
Instructions to the TA Authority: Enter the name and address here.		
Total Estimated Cost of Task (Applicable Taxes extra) before any revisions:		\$ _____ Instructions to the TA Authority: Enter the amount here.
<b>TA Revisions Previously Authorized</b>		
Instructions to the TA Authority: the information for the previously authorized revisions must be presented in ascending order of assigned revision numbers (the first revision must be identified as No. 1, the second as No. 2, etc.). If no increase or decrease was authorized, enter \$0.00. Add rows, as needed		
TA Revision Number: _____ Instructions to the TA Authority: Enter the number here, as applicable.	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____ Instructions to the TA Authority: Enter the amount here, as applicable.	
TA Revision Number: _____ Instructions to the TA Authority: Enter the number here, as applicable.	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____ Instructions to the TA Authority: Enter the amount here, as applicable.	
TA Revision Number: _____ Instructions to the TA Authority: Enter the number here, as applicable.	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____ Instructions to the TA Authority: Enter the amount here, as applicable.	
TA Revision Number: _____ Instructions to the TA Authority: Enter the number here, as applicable.	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____ Instructions to the TA Authority: Enter the amount here, as applicable.	
TA Revision Number: _____ Instructions to the TA Authority: Enter the number here, as applicable.	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____ Instructions to the TA Authority: Enter the amount here, as applicable.	
<b>New TA Revision</b>		
Instructions to the TA Authority: the first revision must be identified as No. 1, the second as No. 2, etc. If no increase or decrease is authorized, enter \$0.00.		
TA Revision Number: _____ Instructions to the TA Authority: Enter the number here, as applicable.	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____ Instructions to the TA Authority: Enter the amount here, as applicable.	
Total Estimated Cost of Task (Applicable Taxes extra) after this revision:	\$ _____ Instructions to the TA Authority: Enter the amount here, as applicable.	
<b>Contract Security Requirements (as applicable)</b>		
This task includes security requirements.		
<input type="checkbox"/> No <input type="checkbox"/> Yes. Refer to the Security Requirements Checklist (SRCL) annex of the Contract.		
Remarks:		
<b>Required Work</b>		
Instructions to the TA Authority: The content of sections A, B, C and D below must be in accordance with the Contract. To view the instructions for Section A, click on the hyperlink.		

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### SECTION A – Task Description of the Work Required

### SECTION B – Applicable Basis of Payment

- Firm Lot Price
- Ceiling Price
- Limitation of Expenditure

### SECTION C - Cost Breakdown of Task

### SECTION D- Applicable Method of Payment

- Single Payment
- Progress Payments
- Monthly Payment

### Authorization - Authorization

By signing this TA, the Project Authority or the PWGSC Contracting Authority or both, as applicable, certify (ies) that the content of this TA is in accordance with the Contract.

En apposant sa signature sur cette AT, le chargé de projet ou l'autorité contractante de TPSGC ou, s'il y a lieu, les deux atteste(nt) que le contenu de cette AT respecte les conditions du contrat.

Name of Project Authority - Nom du chargé de projet \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name of PWGSC Contracting Authority -  
Nom de l'autorité contractante de TPSGC \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

### Contractor's Signature - Signature de l'entrepreneur

Name and title of individual authorized to sign for the Contractor  
Nom et titre de la personne autorisée à signer au nom de l'entrepreneur

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Signature \_\_\_\_\_

Date \_\_\_\_\_