



RETURN BIDS TO:

Employment and Social Development Canada (ESDC)

Attention: Robert Hayman
Senior Procurement Specialist
Chief Financial Officer Branch
Employment and Social Development Canada
Government of Canada

nc-solicitations-gd@hrsc-rhdcc.gc.ca

REQUEST FOR PROPOSAL

Proposal To: Employment and Social Development 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 thereof.

Instructions : See Herein

Title: Dynamic socio-economic microsimulation population model	
Solicitation No. 100012362	Date: February 7, 2019
Solicitation Closes March 20, 2019 02 :00 PM / 14 h	Time Zone Eastern Standard Time (EST)
Address Inquiries to : nc-solicitations-gd@hrsc-rhdcc.gc.ca Size limit – 13MB	

Vendor/firm Name and address :

Facsimile No.

Telephone No.

Name and title of person authorized to sign on behalf of Vendor/firm (type or print)

Signature

Date



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Title:

Dynamic socio-economic microsimulation population model

PART 1 - GENERAL INFORMATION

1. Introduction

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

Part 1 General Information: provides a general description of the requirement;

Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;

Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;

Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;

Part 5 Certifications: includes the certifications to be provided;

Part 6 Security, 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.

2. Summary

Employment and Social Development Canada (ESDC) is launching an ongoing project to create and maintain a large-scale dynamic socio-economic microsimulation population model in order to meet its particular policy and program needs for high quality information and projections in the retirement income domain. The initial focus of the project will be modelling the detailed outcomes of the Canada Pension Plan.

To support this initiative, ESDC has a multi-year requirement for external specialized expertise to closely collaborate with Statistics Canada in the design, development and maintenance of such a model.

3. Debriefings

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



PART 2 - BIDDER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *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 (2018-05-22) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation, with the exception of the following:

1. Replace references to 'Public Works and Government Services Canada' with 'Employment and Social Development Canada';
2. Delete Section 02, Procurement Business Number, in its entirety;
3. Revise Subsection 2d. of Section 05, Submission of Bids, to read:

“send its bid only to the physical or e-mail address specified on Page 1”.
4. Subsection 5.4 of Section 05 is amended as follows:

Delete: sixty (60) days
Insert: ninety calendar (90) days
5. Delete Subsections 1a. and 1b. of Section 12, Rejection of Bid, in their entirety.
6. Delete Subsection 2. of Section 20, Further Information, in its entirety.

2. Submission of Bids

Bids must be received at the email address nc-solicitations-gd@hrsdc-rhdcc.gc.ca, by the time and date indicated on the cover page of this RFP document.

It is the Bidders responsibility to ensure their proposal and all associated documents are received in full and on time. It is advised that Bidders send the proposal in advance of the closing time to ensure confirmation of receipt. Bidders should ensure e-mails do not exceed 13MB to avoid problems with transmission.



3. Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than 3 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 questions or may request that the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

4. Applicable Laws

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

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

5. Basis for Canada's Ownership of Intellectual Property

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

Where the main purpose of the Crown Procurement Contract, or the deliverables contracted for, is:

To generate knowledge and information for public dissemination

- *It should be noted that the Department's intent is to make the model a public good freely available to interested users. As such, while the supplier will have wide rights to use the model and related materials for any of its own purposes, the supplier will not have intellectual property over its contributions to the model.*



PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

Canada requests that Bidders provide their full company name and address, e-mail address, as well as contact name, and telephone number.

Canada requests that bidders provide their bid in separately bound sections, in two separate envelopes, when submitted in hard copy, and in two separate files, when in soft copy, as follows:

Section I: Technical Bid 1 soft copy via e-mail,

Section II: Financial Bid 1 soft copy via e-mail,

Section III: Certifications 1 soft copy via e-mail,

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 format;
- (b) use a numbering system that corresponds to the bid solicitation.

Section I: Technical Bid

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

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

All mandatory technical criteria are identified specifically with the words “shall”, “must”, or “will”. The Technical Bid must demonstrate compliance with all mandatory evaluation criteria and must also specifically respond to each of the point-rated evaluation criteria.

Section II: Financial Bid



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Bidders must submit their Financial Bid in Canadian funds, in accordance with the Pricing Schedule detailed in **Attachment 1 to Part 3**. The total amount of Goods and Services Tax (GST) or Harmonized Sales Tax (HST), as applicable, must be shown separately, if applicable.

Section III: Certifications

Bidders must submit the certifications required under Part 5.



ATTACHMENT 1 TO PART 3

Pricing Schedule

The bidder must complete this pricing schedule and include it in its Financial Bid.

Any estimated level of services specified in this pricing schedule is provided for bid evaluation price determination purposes only. Levels of efforts are provided as estimates only, and must not be construed as a commitment by ESDC to respect those estimates in any resulting contract.

Maximum budget must not exceed \$2,000,000 all applicable taxes and associated travel and accommodation included. Bids with total costs exceeding \$500,000 including taxes and associated travel and accommodation in any fiscal year will be considered non-responsive.

The Contractor will be paid in accordance with the following milestones/deliverables:

Delivery Date	Deliverable	Firm Price
2019/2020		
June 28, 2019	Collaboration plan developed by the contractor, Statistics Canada and ESDC	5%
Sept. 30, 2019	Detailed proposed project plan encompassing the contract’s 4 year duration. Proposed work plan for next 6 months.	5%
Dec. 31, 2019	Quarterly progress report.	5%
March 15, 2020	Annual progress report and proposed annual work plan. Examples of interim work (data analysis, estimation results, documentation, etc.)	10%
2020/2021		
June 30, 2020	Quarterly progress report.	5%
Sept. 30, 2020	Quarterly progress report.	5%
Dec. 31, 2020	Quarterly progress report.	5%
March 15, 2021	Annual progress report and proposed annual work plan. Examples of interim work (data analysis, estimation results, documentation, etc.)	10%
2021/2022		
June 30, 2021	Quarterly progress report.	5%
September 30, 2021	Quarterly progress report. Initial model prototype for training and testing by ESDC	5%
December 31, 2021	Quarterly progress report.	5%
March 15, 2022	Annual progress report and proposed annual work plan. Examples of interim work (data analysis, estimation results, documentation, etc.)	10%



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2022/2023		
June 30, 2022	Quarterly progress report.	5%
Sept. 30, 2022	Quarterly progress report. Beta version of model for training and testing by ESDC.	5%
Dec. 31, 2022	Quarterly progress report.	5%
March 15, 2023	Operational model suitable for policy analysis; project report; model validation and documentation.	10%
	Total firm price	100%



PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

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

1.1 Technical Evaluation

Mandatory and point rated technical evaluation criteria are included in Annex "B".

1.2 Financial Evaluation

The price of the bid will be evaluated in Canadian dollars, Applicable Taxes excluded, FOB destination, Canadian customs duties and excise taxes included.

2. Basis of Selection

2.1 Basis of Selection - Highest Combined Rating of Technical and Price

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria.
2. Bids not meeting (a) or (b) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 80 % for the technical merit and 20 % for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained multiplied by the ratio of 80 % .
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 20 %
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.



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8. Tie Breaker: When two or more responsive proposals achieve the identical score, the proposal with the highest score in the Rated Criteria will be will be recommended for contract award..



PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default, if any certification made by the Bidder is found to be untrue whether 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 with this request will render the bid non-responsive or will constitute a default under the Contract.

1. Mandatory Certifications Precedent to Contract Award

The certifications and additional information listed below should be submitted with the bid but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement.

Failure to provide the certifications or the additional information listed below within the time frame specified will render the bid non-responsive.

1.1 Declaration of Convicted Offences

If requested by the Contracting Authority, pursuant to subsection Declaration of Convicted Offences of section 01 of the Standard Instructions, the Bidder must provide a completed [Declaration Form](http://www.tpsgc-pwgsc.gc.ca/ci-if/formulaire-form-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/formulaire-form-eng.html>), to be given further consideration in the procurement process.

Integrity Provisions – List of Names

Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder.

Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s).

Bidders bidding as societies, firms or partnerships do not need to provide lists of names.

1.2 Federal Contractors Program for Employment Equity - Bid Certification



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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](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from [Human Resources and Social Development Canada \(ESDC\) - Labour's](#) website

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

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 annex [Federal Contractors Program for Employment Equity - Certification](#), before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

1.3 Former Public Servant Certification

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPS, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

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

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



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- e. "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.
- f. "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** ()

* Bidder (For greater clarity, the "Bidder" means the vendor legal entity (e.g. not a resource of the vendor legal entity)).

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

- a. name of former public servant;
- b. date of termination of employment or retirement from the Public Service.

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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

- a. name of former public servant;
- b. conditions of the lump sum payment incentive;
- c. date of termination of employment;



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

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

1.4 Status and Availability of Resources

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

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

1.5 Education and Experience

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



PART 6 – SECURITY

1. Security Requirement

1. Prior to access to protected information, assets or sensitive work site(s), the following conditions must be met:

For the purposes of this project, Statistics Canada has accepted the responsibility for performing the security clearances necessary for external suppliers and its researchers to access Statistics Canada's Research Data Centre network or at the Canadian Centre for Data Development and Economic Research at Statistics Canada's head office in Ottawa.

- The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Services and Procurement Canada (PSPC)
- The Contractor/Offeror personnel requiring access to protected information, assets or sensitive work site(s) must EACH hold a valid reliability status, granted or approved by CISD/PSPC
- The Contractor/Offeror must not remove any protected information or assets from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction
- Subcontracts which contain security requirements are not to be awarded without the prior written permission of CISD/PSPC
- The Contractor/Offeror must comply with the provisions of the:
 - a. Security Requirements Check List attached at Annex C
 - b. Industrial Security Manual (Latest Edition)



PART 7 - RESULTING CONTRACT CLAUSES

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

1. Applicable Laws

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

2. 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 - Higher Complexity - Services (2018-06-21);
- (c) Annex "A", Statement of Work;
- (d) Annex "B", Security Requirements Check List;
- (e) the Contractor's bid dated _____,

3. Statement of Work

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

4. Standard Clauses and Conditions

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

Whenever 'Public Works and Government Services Canada' appears in any of the standard clauses or the General or Supplemental Conditions replace with "Employment and Social Development Canada".

4.1 General Conditions

2035 (2018-06-21), General Conditions - Higher Complexity - Services, apply to and form part of the Contract, with the following exceptions:

- 4.1.1 Delete reference to 'Client Reference Number (CRN)' and 'Procurement Business Number (PBN)' from Section 12, sub-section 2.a
- 4.1.2 Delete sub-sections 14
- 4.1.3 Delete sub-sections 15



4.1.4 Delete sub-sections 19

4.1.5 Delete sub-sections 20

5. Security Requirement

1. Prior to access to protected information, assets or sensitive work site(s), the following conditions must be met:

For the purposes of this project, Statistics Canada has accepted the responsibility for performing the security clearances necessary for external suppliers and its researchers to access Statistics Canada's Research Data Centre network or at the Canadian Centre for Data Development and Economic Research at Statistics Canada's head office in Ottawa.

- The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Services and Procurement Canada (PSPC)
- The Contractor/Offeror personnel requiring access to protected information, assets or sensitive work site(s) must EACH hold a valid reliability status, granted or approved by CISD/PSPC
- The Contractor/Offeror must not remove any protected information or assets from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction
- Subcontracts which contain security requirements are not to be awarded without the prior written permission of CISD/PSPC
- The Contractor/Offeror must comply with the provisions of the:
 - a. Security Requirements Check List attached at Annex C
 - b. Industrial Security Manual (Latest Edition)

6. Period of the Contract

The period of the Contract is from contract award to _____ inclusive.

7. Authorities

7.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: _____ Title: _____



Employment and Social Development Canada
Procurement and Contracting

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.

7.2 Project Authority

The Project Authority for the Contract is:

To be provided at time of Contract award

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.

7.3 Contractor's Representative

The Contractor's Representative for the Contract is:

To be provided at time of Contract award

8. Payment

8.1 Basis of Payment – Firm Lot Price(s)

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm lot price” of \$ _____. Customs duties are included, and Applicable Taxes are extra.

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

9. Method of Payment

9.1 Milestone Payments

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 and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

9.2 Schedule of Milestones

The supplier and its resources will be required to render the following deliverables, in collaboration with Statistics Canada and in consultation with the ESDC Project Authority, as per the schedule below. The supplier will be paid the following firm prices in accordance with the following schedule.

Delivery Date	Deliverable	Firm Price
2019/2020		
June 28, 2019	Collaboration plan developed by the contractor, Statistics Canada and ESDC	5%
September 30, 2019	Detailed proposed project plan encompassing the contract’s 4 year duration. Proposed work plan for next 6 months.	5%
December 31, 2019	Quarterly progress report.	5%
March 15, 2020	Annual progress report and proposed annual work plan. Examples of interim work (data analysis, estimation results, documentation, etc.)	10%
2020/2021		
June 30, 2020	Quarterly progress report.	5%
September 30, 2020	Quarterly progress report.	5%
December 31, 2020	Quarterly progress report.	5%
March 15, 2021	Annual progress report and proposed annual work plan. Examples of interim work (data analysis, estimation results, documentation, etc.)	10%
2021/2022		
June 30, 2021	Quarterly progress report.	5%
September 30, 2021	Quarterly progress report. Initial model prototype for training and testing by ESDC	5%
December 31, 2021	Quarterly progress report.	5%
March 15, 2022	Annual progress report and proposed annual work plan. Examples of interim work (data analysis, estimation results, documentation, etc.)	10%
2022/2023		
June 30, 2022	Quarterly progress report.	5%



September 30, 2022	Quarterly progress report. Beta version of model for training and testing by ESDC.	5%
December 31, 2022	Quarterly progress report.	5%
March 15, 2023	Operational model suitable for policy analysis; project report; model validation and documentation.	10%
	Total firm price	100%

10. Invoice Submission

1. Invoices must be submitted in the Contractor's name, either by mail to the address on the cover page or by e-mail to the Project Authority (see article 7.2). The Contractor must submit invoices for each delivery or shipment; invoices must only apply to the Contract. Each invoice must indicate whether it covers partial or final delivery.
2. Invoices must show:
 - a. the date, the name and address of the client department, item or reference numbers, deliverable/description of the Work, contract number, and financial code(s);
 - b. details of expenditures (such as item, quantity, unit of issue, unit price, fixed time labour rates and level of effort, subcontracts, as applicable) in accordance with the Basis of Payment, exclusive of Applicable Taxes;
 - c. deduction for holdback, if applicable;
 - d. the extension of the totals, if applicable; and
 - e. if applicable, the method of shipment together with date, case numbers and part or reference numbers, shipment charges and any other additional charges.
3. Applicable Taxes must be specified on all invoices as a separate item along with corresponding registration numbers from the tax authorities. All items that are zero-rated, exempt or to which Applicable Taxes do not apply, must be identified as such on all invoices.
4. By submitting an invoice, the Contractor certifies that the invoice is consistent with the Work delivered and is in accordance with the Contract.

10.1. T1204 Information Reporting by Contractor

1. Pursuant to paragraph 221 (1)(d) of the [Income Tax Act](#), R.S. 1985, c.1 (5th Supp.), payments made by departments and agencies to contractors under applicable services contracts (including contracts involving a mix of goods and services) must be reported on a T1204 Government Service Contract Payments slip.

11. Foreign Nationals (Canadian Contractor)



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The Contractor must comply with Canadian immigration requirements applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Contract. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Contract, the Contractor should immediately contact the nearest Service Canada regional office to enquire about Citizenship and Immigration Canada's requirements to issue a temporary work permit to a foreign national. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

12. Proactive Disclosure of Contracts with Former Public Servants (if applicable)

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

13. Certifications

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

14. Intellectual Property

Canada to Own Intellectual Property Rights in Foreground Information

- **01** Interpretation
- **02** Disclosure of Foreground Information
- **03** Canada to Own Intellectual Property Rights in Foreground Information
- **04** License to Intellectual Property Rights in Background Information
- **05** Right to License
- **06** Access to Information; Exception to Contractor Rights
- **07** Waiver of Moral Rights
- Copyright (Re: 6.5)
- This location is a placeholder for a clause which will grant license rights to the successful bidder. It is anticipated that the resulting contractor will be granted a non-exclusive, royalty-free, irrevocable, fully-paid, perpetual, world-wide license to exercise all intellectual property rights in the foreground information.



01 Interpretation

1. In the Contract,

"Background Information" means all Technical Information that is not Foreground Information and that is proprietary to or the confidential information of the Contractor, its Subcontractors or any other supplier of the Contractor;

"Firmware" means any computer program stored in integrated circuits, read-only memory or other similar devices;

"Foreground Information" means any Invention first conceived, developed or reduced to practice as part of the Work under the Contract and all other Technical Information conceived, developed or produced as part of the Work under the Contract;

"Intellectual Property Right" means any intellectual property right recognized by the law, including any intellectual property right protected through legislation (such as that governing patents, copyright, industrial design, integrated circuit topography, or plant breeders' rights) or arising from protection of information as a trade secret or as confidential information;

"Invention" means any new and useful art, process, machine, manufacture or composition of matter, or any new and useful improvement in any art, process, machine, manufacture or composition of matter, whether or not patentable;

"Software" means any computer program whether in source or object code (including Firmware), any computer program documentation recorded in any form or medium, and any computer database, and includes modifications to any of the foregoing;

"Technical Information" means all information of a scientific, technical or artistic nature relating to the Work, whether oral or recorded in any form or medium and whether or not subject to copyright, including but not limited to any Inventions, designs, methods, processes, techniques, know-how, models, prototypes, patterns, samples, schematics, experimental or test data, reports, drawings, plans, specifications, photographs, collections of information, manuals and any other documents, and Software. Technical Information does not include data concerned with the administration of the Contract by Canada or the Contractor, such as internal financial or management information, unless it is a deliverable under the Contract.

02 Disclosure of Foreground Information

1. The Contractor shall promptly report and fully disclose to the Minister all Foreground Information that could be Inventions, and shall report and fully disclose to the Minister all other Foreground Information not later than the time of completion of the Work or at such earlier time as the Minister or the Contract may require.
2. Before and after final payment to the Contractor, the Minister shall have the right to examine all records and supporting data of the Contractor which the Minister reasonably deems pertinent to the identification of Foreground Information.



03 Canada to Own Intellectual Property Rights in Foreground Information

1. Without affecting any Intellectual Property Rights or interests therein that have come into being prior to the Contract, all Intellectual Property Rights in the Foreground Information shall immediately, as soon as they come into existence, vest in and remain the property of Canada. The Contractor shall have no right in or to any such Intellectual Property Rights in the Foreground Information except any right that may be granted in writing by Canada.
2. The Contractor shall incorporate the copyright symbol and either of the following copyright notices, as appropriate, into all Foreground Information that is subject to copyright, regardless of the form in or medium upon which it is recorded:
 - (c) HER MAJESTY THE QUEEN IN RIGHT OF CANADA (year)

or

 - (c) SA MAJESTÉ LA REINE DU CHEF DU CANADA (year)
3. (i) For greater certainty, the Contractor agrees that where the Work under the Contract involves the preparation of a database or other compilation using information or data supplied by Canada or personal information referred to in paragraph (ii), then the Contractor shall not use or disclose any such information or data or personal information for any purpose other than completing the Work under the Contract. The Contractor shall not dispose of such information or data or personal information except by returning it to Canada. The Contractor shall comply with the General Conditions of the Contract in regard to maintaining the confidentiality of such information, data, or personal information. Unless the Contract otherwise expressly provides, the Contractor shall deliver to Canada all such information, data, or personal information, together with every copy, draft, working paper and note thereof that contains such information, data, or personal information upon completion or termination of the Contract or at such earlier time as the Minister may require.
 - (ii) For greater certainty and without limiting sub-section 03(1), if the Work under the Contract involves the collection of personal information as that term is defined in the Privacy Act (R.S.C., c. P-21), then all Intellectual Property Rights in and title to that personal information shall, immediately upon the collection of it by the Contractor, vest in Canada, and the Contractor shall have no right or interest in it.
4. The Contractor shall execute such conveyances or other documents relating to the Intellectual Property Rights in the Foreground Information as the Minister may require, and the Contractor shall, at Canada's expense, afford the Minister all reasonable assistance in the preparation of applications and in the prosecution of any applications for registration of any Intellectual Property Right in any jurisdiction, including without limitation the assistance of the inventor in the case of Inventions.

04 License to Intellectual Property Rights in Background Information



1. The Contractor hereby grants to Canada a non-exclusive, perpetual, irrevocable, world-wide, fully-paid and royalty-free license to exercise such of the Intellectual Property Rights in any Background Information incorporated into the Work or necessary for the performance of the Work as may be required for the following purposes:
 1. for the use, operation, maintenance, repair or overhaul of the Work;
 2. in the manufacturing of spare parts for maintenance, repair or overhaul of any custom part of the Work by Canada if those parts are not reasonably available to enable timely maintenance, repair or overhaul;
 3. for disclosure to any contractor engaged by Canada (or bidder for such a contract) to be used solely for a purpose set out in paragraph (a) or (b), but only if the Contractor is unable or unwilling to carry out the maintenance, repair or overhaul or provide the spare parts on reasonable commercial terms and within reasonable delivery times;

and the Contractor agrees to make any such Background Information (including, in the case of Software, source code) promptly available to Canada for any such purpose.

2. The Contractor hereby further grants to Canada a non-exclusive, perpetual, irrevocable, world-wide, fully-paid and royalty-free license to exercise such of the Intellectual Property Rights in the Background Information incorporated into the Work or necessary for the performance of the Work as are necessary in order for Canada to modify, improve or further develop the Foreground Information. Canada's rights under this subsection 2 shall not include the right to reproduce the whole or part of any deliverable under the Contract that does not incorporate Foreground Information, save that Canada may reproduce any drawings, plans, designs, or other Background Information that are subject to copyright or industrial design protection, for purposes of modification, improvement or further development of the Foreground Information by or for Canada. The Contractor agrees to make any such Background Information (including, in the case of Software, source code) promptly available to Canada for any such purpose.
3. Notwithstanding subsections 1 and 2, the license set out therein shall not apply to any Software that is subject to detailed license conditions that are set out elsewhere in the Contract.
4. The Contractor acknowledges that, subject to paragraph (c) of subsection 1, Canada may wish to award contracts for any of the purposes contemplated in subsections 1 and 2 and that such contract awards may follow a competitive process. The Contractor agrees that Canada's license in relation to the Intellectual Property Rights in Background Information includes the right to disclose the Background Information to bidders for such contracts, and to sub-license or otherwise authorize the use of that information by any contractor engaged by Canada solely for the purpose of carrying out such a contract. Canada shall require bidders and the contractor not to use or disclose any Background Information except as may be necessary to bid for or to carry out that contract.
5. Where the Intellectual Property Rights in any Background Information are owned by a Subcontractor at any tier, the Contractor shall either obtain a license from that Subcontractor that permits compliance with subsections 1 and 2 or arrange for the Subcontractor to convey directly to Canada the same rights by execution of the form provided for that purpose by the Minister, in



which case the Contractor shall deliver that form to the Minister, duly completed and executed by the Subcontractor, no later than the time of disclosure to Canada of that Background Information.

05 Right to License

The Contractor represents and warrants that the Contractor has, or the Contractor undertakes to obtain, the right to grant to Canada the license to exercise the Intellectual Property Rights in the Background Information as required by the Contract.

06 Access to Information; Exception to Contractor Rights

1. Subject to the Access to Information Act, R.S.C., c. A-1 and to any right of Canada under the Contract, Canada shall not release or disclose outside the Government of Canada any Background Information delivered to Canada under the Contract that is confidential information or a trade secret of the Contractor or a Subcontractor.
2. Nothing in these terms and conditions shall be construed as limiting Canada's right to exercise the Intellectual Property Rights in any Background Information, or to disclose any Background Information, to the extent that such information:
 1. is or becomes in the public domain, or to the extent that the Contractor does not benefit from or ceases to benefit from any intellectual property rights protection for such information under legislation or at law (other than under the terms of the Contract), for any reason including as a result of Canada's use or disclosure of deliverables under the Contract for any purpose whatever that is not expressly excluded under the Contract;
 2. is or becomes known to Canada from a source other than the Contractor, except from any source that is known to Canada to be under an obligation to the Contractor not to disclose the information;
 3. is independently developed by or for Canada; or
 4. is disclosed under compulsion of a legislative requirement or any order of a court or other tribunal having jurisdiction.

07 Waiver of Moral Rights

1. The Contractor shall provide to Canada, at the completion of the Work or at such other time as the Minister may require, a written permanent waiver of moral rights (as that term is defined in the Copyright Act, R.S.C., c. C-42), in a form acceptable to the Minister, from every author that contributed to any Foreground Information which is subject to copyright protection and which is deliverable to Canada under the terms of the Contract.
2. If the Contractor is an author of the Foreground Information referred to in subsection 1, the Contractor hereby permanently waives the Contractor's moral rights in that Foreground Information.



Copyright (Re: 6.5)

Copyright

1. In this section,

"Material" means anything that is created or developed by the Contractor as part of the Work under the Contract, and in which copyright subsists, but does not include computer programs and related software documentation.

"Moral Rights" has the same meaning as in the Copyright Act, R.S.C. 1985, c. C-42.

2. Copyright in the Material shall vest in Canada and the Contractor shall incorporate in all Material the copyright symbol and either of the following notices, as appropriate:

(c) HER MAJESTY THE QUEEN IN RIGHT OF Canada (year)

or

(c) SA MAJESTÉ LA REINE DU CHEF DU CANADA(year)

3. At the completion of the Contract, or at such other time as the Contract or the Minister may require, the Contractor shall fully and promptly disclose to the Minister all Material created or developed under the Contract.

4. Where copyright in any Material vests in Canada under the Contract, the Contractor shall execute such conveyances and other documents relating to title or copyright as the Minister may require.

5. The Contractor shall not use, copy, divulge or publish any Material except as is necessary to perform the Contract.

6. At the request of the Minister, the Contractor shall provide to Canada, at the completion of the Work or at such other time as the Minister may require, a written permanent waiver of Moral Rights, in a form acceptable to the Minister, from every author that contributed to the Material.

7. If the Contractor is an author of the Material, the Contractor hereby permanently waives the Contractor's Moral Rights in respect of the Material.

Termination by mutual consent

- a. On rare occasions both parties may agree to termination without claims or penalties, usually where the client has requested full or partial termination of a contract, the contractor has incurred minor or no expenses and is willing to forego a claim, and the matter may be settled at no cost to Canada.
- b. Termination by mutual consent does not apply when it is in Canada's interest to issue a termination for default or when the contractor claims additional costs following the reduction or cancellation of all or a portion of the contract.



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- c. On receiving the client's request for termination by mutual consent, the contracting officer should request the contractor to confirm that no claim is involved, and must refer the matter to Legal
- Services in accordance with 8.135.35 Involvement of Legal Services in Cases of Termination.

The standard Procurement clause re: termination for mutual consent can be referenced here. <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/5/J/J0003C/6>



ANNEX “A”

STATEMENT OF WORK

Title

Dynamic socio-economic microsimulation population model

Background Statement

Employment and Social Development Canada (ESDC) is launching an ongoing project to create and maintain a large-scale dynamic socio-economic microsimulation population model in order to meet its particular policy and program needs for high quality information and projections in the retirement income domain. The initial focus of the project will be modelling the detailed outcomes of the Canada Pension Plan.

To support this initiative, ESDC has a multi-year requirement for external specialized expertise to closely collaborate with Statistics Canada in the design, development and maintenance of such a model.

In recent years, these types of models have become core analytical tools for many national governments, as they are ideal for framing and exploring “what-if” questions. These types of models create a virtual “policy laboratory” for exploring socio-economic outcomes and detailed implications of policy changes, including complex interactions within and between programs, and assessment of the distributional impacts of policy choices.

These models are the only tools capable of effectively evaluating policies with an explicit longitudinal dimension, such as pensions, whose outcomes depend on lifetime earnings and coverage histories and links between individuals (i.e., family formation and dissolution, survivor benefits, etc.). They also inform medium and longer-term strategic policy analysis by providing a consistent, comprehensive framework for the exploration of future demographic and socio-economic outcomes at the level of individuals and families.

For example, with the assistance of the Urban Institute and other contractors, the United States Social Security Administration has developed such a tool, known as the Modelling Income in the Near Term model. Potential suppliers are directed to an overview document on the latter model for further context on this type of project (available in English only):

<https://www.urban.org/sites/default/files/publication/22116/413131%20-%20A-Primer-on-Modeling-Income-in-the-Near-Term-Version-MINT-.pdf>

Further context on these types of models can be found in the following publication:

Anil Gupta, Ann Harding (ed.) *Modelling Our Future: Population Ageing, Health and Aged Care* (International Symposia in Economic Theory and Econometrics, Volume 16) Emerald Group Publishing Limited.



Objective and Scope

The objective of this requirement is to engage the services of a supplier who will provide expertise and closely collaborate with Statistics Canada in the design, development and maintenance of a dynamic socio-economic microsimulation population model that meets ESDC's needs.

It should be noted that the Department's intent is to make the model a public good freely available to interested users. As such, while the supplier will have wide rights to use the model and related materials for any of its own purposes, the supplier will not have intellectual property over its contributions to the model.

- *See PART 7 Resulting Contract Clauses 14*

Tasks

In order to support the Department's objectives, the contractor agrees to perform the tasks listed below.

The task distribution between the contractor and Statistics Canada will be collaboratively negotiated by the two parties in consultation with the ESDC Project Authority.

It is anticipated that the work undertaken under this contract will include, but not necessarily be limited to, the following activities:

- Negotiated collaboration between the contractor, Statistics Canada and ESDC regarding project roles;
- Ongoing consultation with Departmental stakeholders to assess their dynamic microsimulation goals, and consider the implications for the model's development;
- Providing expert input into major model design decisions;
- Critical evaluation and detailed analysis of the Canadian demographic and socio-economic data available from Statistics Canada (census, survey, and administrative) to support the life-course modelling of the micro-level histories and the demographic/socio-economic outcomes necessary to model the evolution of the Canadian population and individual retirement income outcomes across time and cohorts;

A significant amount of this data may be only accessible in-person through Statistics Canada's Research Data Centre network or at the Canadian Centre for Data Development and Economic Research at Statistics Canada's head office in Ottawa

- Designing and implementing modelling strategies, techniques, and specifications to simulate a wide range of inter-related demographic/socio-economic states and processes - mortality, fertility, disability, geographic mobility, education, employment, earnings, saving in various forms etc;



- Specifying and estimating complex statistical models and parameters, to effectively capture the observed distributions of micro-level demographic/socio-economic outcomes in the population and their dynamics over the life-course and across time and cohorts;
- Developing modules to simulate government tax and transfer programs, including the Canada Pension Plan, at a very granular level of detail, including the interactions between the different provisions of complex programs, and the interactions between such programs and the broader tax and transfer system;
- Programming and debugging model code;
- Performing extensive initial and ongoing testing and validation of model results for internal consistency and against actual data on the distribution of individual Canadians' socio-economic experience, as well as against other benchmarks, such as the projections of the Chief Actuary of Canada;
- Updating the model over the course of the contract to extend its capabilities, to reflect new data on the demographic and socio-economic experiences of Canadians, and to incorporate changes in the provisions of the government programs simulated by the model.
- Evaluating the potential of modern data management tools to increase the efficiency with which the model could be updated or tested;
- Developing an effective user interface, flexible tabulation and other input and output facilities to support the practical use of the model by Department policy analysts and other users;
- Developing documentation required to support the functionality of the model, including its use by Department policy analysts and other users;
- Providing training and support to Department policy analysts in the use of the model;
- Providing expert explanation, interpretation of the model and its outputs, and advising users of the model how to make the best use of its capacities.

Team Composition

Suppliers will be required to propose a team solution for this requirement. The experience and knowledge necessary for this project could be supplied in various configurations. For example, an appropriate team might be comprised of an obvious project lead with extensive expertise in many of the relevant domains, supported by a number of team members with lesser expertise. Or a team might be comprised of a number of individuals with extensive expertise in one of the relevant domains, coordinated by a project lead.



Experience suggests that the consistent involvement of at least a team core over the entire project term will be important to its success.

Modelling Technology

An assessment of possible modelling technologies (software and hardware) to be used in the project is currently being performed. The project may require working with Modgen, OpenM++, or with other designated programming languages.

Deliverables

In order to support the Department's objectives, the contractor must, in collaboration with Statistics Canada and in consultation with the ESDC Project Authority, provide the following deliverables:

- Collaboration plan developed by the contractor, Statistics Canada and ESDC;
- Detailed proposed project plan;
- Annual progress reports and proposed work plans;
- Quarterly progress reports;
- Initial model prototype for training and testing by ESDC;
- Beta version of model for training and testing by ESDC;
- In-person training session on the model's usage and functionality each time a version of the model is delivered;
- Operational model suitable for policy analysis;
- Project report ;
- Model validation ;
- Model documentation.

As applicable, deliverables must be provided in formats routinely used by the Department, i.e., Microsoft Word, Excel, and PowerPoint, as well as in Adobe portable document format. An Excel file containing any charts, graphs, or tables used in a document, and the associated data, should also be provided where applicable.

Constraints

As part of the requirement, the proposed supplier and its resources will be required to work in close conjunction with Statistics Canada in consultation with the ESDC Project Authority. The nature of this



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collaboration will need to be negotiated between the proposed supplier, Statistics Canada and with the ESDC Project Authority.

The supplier must provide resources, as necessary, that meet the security and other requirements necessary to access Statistics Canada's Research Data Centres.

A substantial amount of the work will require accessing confidential data that will only be accessible in-person through Statistics Canada's Research Data Centre network or at the Canadian Centre for Data Development and Economic Research at Statistics Canada's head office in Ottawa.

A limited amount of the work (up to 20 full-time days per year) may require accessing confidential data that that will only be accessible in-person at the Canadian Centre for Data Development and Economic Research at Statistics Canada's head office in Ottawa.

Any fees charged by Statistics Canada to access these confidential data will be the responsibility of the Department.

Client Support and Reference Documentation

Statistics Canada is in the process of developing a discussion paper evaluating the Department's dynamic microsimulation needs and exploring related model design issues. The successful bidder will be provided a copy of this paper shortly after being awarded the contract.

Level of Effort

An estimated level of effort of approximately the equivalent of 400-800 full-time days per fiscal year is expected for this requirement. The supplier's proposal must include a schedule indicating the level of effort proposed for each specific member of the proposed team in each fiscal year covered by the proposal. It is anticipated that the supplier's level of effort will be relatively consistent across the years covered by the contract.

Location of Work

It is estimated that the work will be carried out at the contractor's premises, at Statistics Canada's Research Data Centre Network, and possibly at Statistics Canada's head office in Ottawa. At least some meetings and updates will take place in the Ottawa-Gatineau region; all travel and accommodation costs will be borne by the contractor.

Performance and Monitoring

In addition to the deliverables called for in this contract, the supplier will have regular project meetings with Statistics Canada officials and will have discussions with the project authority as deemed appropriate.



ANNEX “B”

Evaluation Criteria

Mandatory Criteria

The supplier must identify a specific individual as the *primary resource* for each of the mandatory technical criteria M1 to M4.

Each criterion may be assigned a different *primary resource*. The *primary resource*'s level of effort must be judged sufficient to meet the objectives of the project.

For evaluation purposes, *recent* experience means that the demonstrated experience must include experience within the past five years.

For evaluation purposes, *substantial* experience is the equivalent of that typically obtained through a minimum of five years of work/study in a particular domain.

The supplier must clearly demonstrate that the mandatory technical evaluation criteria are met. In addition to detailed resumes, the supplier must provide a separate, detailed written demonstration that each criterion is met, including specific examples as well as supporting documents and references.

Where the relevant experience took place in the context of a team project, the specific experience and accomplishments of the *primary resource* must be clearly distinguished from those of other individuals.

M1 - The supplier must demonstrate that the <i>primary resource</i> has recent and substantial experience in the design of dynamic socio-economic microsimulation models.	Met / Not Met
M2 - The supplier must demonstrate that the <i>primary resource</i> has <i>recent and substantial</i> experience in the successful development of large-scale dynamic socio-economic microsimulation population models, as demonstrated by major, core contributions to the development of such a model that has either been employed for policy analysis by a government within the past five years, or the outputs of which have been published in a peer-reviewed academic journal, or presented at an academic or professional conference within the same time period.	Met / Not Met
M3 - The supplier must demonstrate that the <i>primary resource</i> has <i>recent and substantial</i> experience analyzing and manipulating a broad range of Canadian socio-economic data, including survey, census and administrative data sources, and including both cross-sectional and longitudinal data.	Met / Not Met



<p>M4 - The supplier must demonstrate that the <i>primary resource</i> has <i>recent and substantial</i> experience employing advanced statistical estimation methods, including the estimation of complex dynamic statistical models.</p>	<p>Met / Not Met</p>
<p>M5 - The supplier must propose a team solution supplying a level of effort of a minimum of the equivalent of 400 full-time days per fiscal year on average.</p>	<p>Met / Not Met</p>

Technical Merit - For evaluation purposes, *recent* experience means that the demonstrated experience must include experience within the past five years.

<p>Rated Criteria</p>	<p>Criteria Defined</p>
<p>R1 - In addition to the minimum experience required by M1, the supplier will demonstrate any further experience that the <i>primary resource</i> has in the design of dynamic socio-economic microsimulation models. (10 points)</p>	<p>The supplier must identify a specific individual as the <i>primary resource</i> for each of rated technical criteria R1 to R9. Each criterion may be assigned a different primary resource.</p> <p><i>For criteria R1 to R9, separate demonstrations should be made for the primary resource and for additional team members. Where the relevant experience took place in the context of a team project, the experience and accomplishments of a specific team member must be clearly distinguished from those of other individuals.</i></p> <p>R1 to R9 will be assessed according to the depth, breadth, and significance of the demonstrated experience and/or knowledge of the <i>primary resource</i>. The sufficiency of the <i>primary resource's</i> level of effort to meet project objectives will be a consideration in the evaluation.</p> <p>The subjective scoring for criteria R1 to R4 will be as follows:</p> <p>0 None – No meaningful experience/knowledge beyond that required by the associated mandatory technical criteria. 1-5 Very good – Experience/knowledge considered the equivalent of that typically obtained through between six and ten years of work/study in a particular domain. 6-10 Excellent – Experience/knowledge considered the equivalent of that typically obtained through more than ten years of work/study in a particular domain.</p>
<p>R2 - In addition to the minimum experience required by M2, the supplier will demonstrate any further experience</p>	



<p>that the <i>primary resource</i> has in the development of large-scale dynamic socio-economic microsimulation population models. (10 points)</p>	
<p>R3 - In addition to the minimum experience required by M3, the supplier will demonstrate any further experience that the <i>primary resource</i> has analyzing and manipulating a broad range of Canadian socio-economic data, including survey, census and administrative data sources, and including both cross-sectional and longitudinal data. (10 points)</p>	
<p>R4 - In addition to the minimum experience required by M4, the supplier will demonstrate any further experience that the <i>primary resource</i> has employing advanced statistical estimation methods, including the estimation of complex dynamic statistical models. (10 points)</p>	
<p>R5 - The supplier will demonstrate the <i>recent</i> experience that the <i>primary resource</i> has in modelling the <i>Canadian Retirement Income System</i> and the broader <i>Canadian Tax and Transfer System</i>. (10 points)</p>	<p>The subjective scoring for criteria R5 to R9 will be as follows</p> <p>0 None – No meaningful experience/knowledge.</p> <p>1-3 Modest – Experience/knowledge considered the equivalent of that typically obtained through less than two years work/study in a particular domain.</p> <p>4-5 Good – Experience/knowledge considered the equivalent of that typically obtained through between two and four years of work/study in a particular domain.</p> <p>6-8 Very good – Experience/knowledge considered the equivalent of that typically obtained through between five and ten years of work/study in a particular domain.</p> <p>9-10 Excellent – Experience/knowledge considered the equivalent of that typically obtained through more than ten years of work/study in a particular domain.</p> <p><i>Where the maximum points awarded for a criterion is 5 points, the subjective score will be weighted by 50% to produce a final</i></p>



	<i>score out of 5 points.</i>
R6 - The supplier will demonstrate the knowledge that the <i>primary resource</i> has of social and economic theory and literature in the areas of income security, income distribution, and labour markets. (10 points)	
R7 - The supplier will demonstrate the knowledge that the <i>primary resource</i> has of the various elements of the <i>Canadian Retirement Income System</i> (broadly defined), and their inter-relationships, including public pension programs, employer pension plans, various forms of individual savings, and the income tax provisions impacting the disposable income of the elderly. (10 points)	
R8 - The supplier will demonstrate the detailed knowledge that the <i>primary resource</i> has of the provisions of the <i>Canada Pension Plan</i> . (5 points)	
R9 - The supplier will demonstrate the knowledge that the <i>primary resource</i> has of demography and demographic projections. (10 points)	
R10 - For criteria R1 to R9 , the supplier will demonstrate the depth of team experience and knowledge beyond the <i>primary resource</i> . (27 points)	<p>R10 assesses the additional expertise the supplier is proposing to provide for each of criteria R1 to R9 beyond that demonstrated by the <i>primary resource</i>. R10 will assign up to three points for the experience and/or knowledge of team members other than the primary resource, for each of criteria R1 to R9, for a potential maximum of 27 points. The subjective scoring for each criterion will be determined by depth, breadth and significance of the demonstrated experience/knowledge, as follows:</p> <p>0 None – No meaningful experience/knowledge beyond that of the <i>primary resource</i>.</p> <p>1 Good – One additional team member has</p>



	<p>experience/knowledge considered the equivalent of that typically obtained through between two and four years of work/study in a particular domain.</p> <p>2 Very Good – One additional team member has experience/knowledge considered the equivalent of that typically obtained through five or more years of work/study in a particular domain OR at least two additional team members have experience/knowledge considered the equivalent of that typically obtained through between two and four years of work/study in a particular domain.</p> <p>3 Excellent – One or more additional team member has experience/knowledge considered the equivalent of that typically obtained through ten or more years of work/study in a particular domain OR two or more additional team members have experience/knowledge considered the equivalent of that typically obtained through five or more years of work/study in a particular domain.</p>
<p>R11 - The supplier will demonstrate the ability of team members to communicate effectively in writing. (5 points)</p>	<p>R11 will be assessed based on the demonstrated effectiveness and breadth of the written communication produced by the proposed team members. The demonstration will include the response to this Request for Proposal and can include technical or analytical papers, presentations, briefing notes, or similar written communication produced by team members. The subjective scoring for criterion R11 will be as follows:</p> <p>0 None – No demonstration of effective written communication.</p> <p>1-2 Fair – Reasonable demonstration of effective communication by team members.</p> <p>3-4 Good – Very effective communication, in a variety of forms, authored primarily by one team member</p> <p>5 Excellent – Diverse examples of very effective written communication demonstrated for multiple team members.</p>
<p>R12 - The supplier will demonstrate the experience that team members have in working effectively on multi-disciplinary teams, and in collaborating effectively on projects with partners, including with government officials. (10 points)</p>	<p>R12 will be assessed based on the demonstrated experience of team members working effectively as part of multi-disciplinary teams and collaborating effectively with partners on joint projects. The examples used to demonstrate the experience should be accompanied by references. The subjective scoring for criterion R12 will be as follows:</p> <p>0 None – No demonstrated experience.</p> <p>1-3 Modest – Team members have modest experience working on multi-disciplinary teams and/or collaborative projects</p>



	<p>4-6 Good – Team members have significant experience working on multi-disciplinary teams and working on collaborative projects.</p> <p>7-8 Very good – Team members have substantial experience working on multi-disciplinary teams and have collaborated with other organizations on multiple projects.</p> <p>9-10 Excellent – Team members have extensive and varied experience working on multi-disciplinary teams and participating in collaborative projects, including collaborations with government officials.</p>
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TOTAL: 127 points

The supplier must clearly demonstrate the experience, knowledge or ability being evaluated for each criterion. In addition to detailed resumes, the supplier must provide a separate, detailed written demonstration for each criterion, including specific examples as well as supporting documents and references.

Where the relevant experience took place in the context of a team project, the specific experience and accomplishments of the primary resource must be clearly distinguished from those of other individuals.



ANNEX “C”

Security Requirements Check List



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

SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / EMPLOYMENT AND SOCIAL DEVELOPMENT CANADA Ministère ou organisme gouvernemental d'origine	2. Branch or Directorate / SOCIAL POLICY DIRECTORATE Direction générale ou Direction	
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 DEVELOPMENT OF A DYNAMIC SOCIO-ECONOMIC MICROSIMULATION MODEL FOR PROJECTIONS IN THE CANADIAN RETIREMENT INCOME DOMAIN.		
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"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies) / Préciser le(s) pays:	Specify country(ies) / Préciser le(s) pays:	Specify country(ies) / Préciser le(s) pays:
7. c) Level of Information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input 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"/>



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

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?
 If Yes, indicate the level of sensitivity:
 Dans l'affirmative, indiquer le niveau de sensibilité:

No / Non Yes / Oui

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
 Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?

No / Non Yes / Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel:
 Document Number / Numéro du document:

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

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

- | | | | |
|---|---|---|--|
| <input checked="" type="checkbox"/> RELIABILITY STATUS
COTE DE FIABILITÉ | <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: RELIABILITY STATUS AT THE INDIVIDUAL LEVEL IS REQUIRED TO ACCESS STATISTICS CANADA'S DATA CENTRES

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?
 If Yes, will unscreened personnel be escorted?
 Dans l'affirmative, le personnel en question sera-t-il escorté?

No / Non Yes / Oui

No / Non Yes / Oui

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
 Le fournisseur sera-t-il tenu de recevoir et d'anreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?

No / Non Yes / Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?
 Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?

No / Non Yes / Oui

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
 Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?

No / Non Yes / Oui

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

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
 Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?

No / Non Yes / Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
 Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?

No / Non Yes / Oui

Security Classification / Classification de sécurité
--



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

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.

Dans le cas des 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 CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET / COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET
							NATO DIFFUSION RESTREINTE	NATO CONFIDENTIEL	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 / Non Yes / Oui

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

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

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



ANNEX D

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 such request by Canada will also render the bid non-responsive or will constitute a default under the Contract.

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

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

Complete both A and B.

A. 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 employees (combined work force includes: permanent full-time, permanent part-time and temporary employees [
- temporary employees only includes those who have worked 12 weeks or more during a calendar year and who are not full-time students.
- A5. The Bidder has a combined workforce in Canada of 100 or more employees; and
- A5.1. The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with HRSDC-Labour.

OR



RFP 100012362

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

B. Check only one of the following:

() B1. The Bidder is not a Joint Venture.

OR

() B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification.

- Refer to the Joint Venture section of the Standard Instructions