



Return Bids to :

Retourner Les Soumissions à :
Natural Resources Canada

Len.Pizzi@Canada.ca

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

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

Proposition à: Ressources Naturelles 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

Issuing Office – Bureau de distribution

Finance and Procurement Management
Branch
Natural Resources Canada
183 Longwood Road South
Hamilton, ON
L8P 0A5

Title – Sujet	
Medium-Term Energy Policy Options for Canada	
Solicitation No. – No de l'invitation	Date
NRCan-5000045240	April 17, 2019
Requisition Reference No. - N° de la demande	
153221	
Solicitation Closes – L'invitation prend fin	
at – à 02:00 PM (Eastern Daylight Savings Time (EDT)) on – le May 2, 2019	
Address Enquiries to: - Adresse toutes questions à:	
Len.Pizzi@Canada.ca	
Telephone No. – No de telephone	Fax No. – No. de Fax
(905) 645-0676	(905) 645-0831
Destination – of Goods and Services: Destination – des biens et services:	
Natural Resources Canada 580 Booth Street Ottawa, ON Canada K1A 0E4	
Security – Sécurité	
There is no security requirements associated with this requirement.	
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No.:- No. de téléphone: Facsimile No.: - No. de télécopieur:	
Name and Title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
_____	_____
Signature	Date



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

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



PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

The Annexes include the Statement of Work and the Basis of Payment.

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

1.2 Summary

By means of the RFP, Natural Resources Canada (NRCan) is seeking proposals from bidders for...

- 1.2.1 In order to address the above changes in the energy sector – including the interplay of technological innovation, consumer/citizen sentiment, falling renewables prices, projected electricity demand growth, and geo-political and geo-economic forces – Canadians and policymakers need to address the overarching question of “What will it take for Canada, as a global leader in energy, to retain a leading position while managing change?” This project is intended to contribute meaningfully to public dialogue on this broad question through a series of further questions (subject to refinement) on key elements of the energy system.
- 1.2.2 The requirement is subject to the provisions of the North American Free Trade Agreement (NAFTA), Canada - Chile Free Trade Agreement, Canada-Colombia Free Trade Agreement, Canada-Honduras Free Trade Agreement, Canada-Korea Free Trade Agreement, Canada–Panama Free trade agreement, and the Canadian Free Trade Agreement (CFTA).

1.3 Debriefings

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



PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<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 modifications to the text below. If there is a conflict between the provisions of 2003 and this document, this document prevails.

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

2.2 Submission of Bids

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

len.pizzi@canada.ca

IMPORTANT

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

NRCan-5000045240 - Medium-Term Energy Policy Options for Canada

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

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

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

2.3 Enquiries - Bid Solicitation

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

2.4 Applicable Laws

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

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

2.5 Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least three (3) days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.



PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

Section I: Technical Bid (1 electronic copy)

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

Section III: Certifications (1 electronic copy)

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

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) 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 in a thorough, concise and clear manner for carrying out the work.

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

Section II: Financial Bid

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

Exchange Rate Fluctuation

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

Section III: Certifications

Bidders must submit the certifications required under Part 5.



PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

4.1.1 Technical Evaluation

Mandatory and point rated technical evaluation criteria are included in Appendix “1” – Evaluation Criteria.

4.2 Basis of Selection

4.2.1 Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria.
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 70% for the technical merit and 30% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points equal 135 and the lowest evaluated price is \$45,000 (45).

Basis of Selection - Highest Combined Rating Technical Merit (70%) and Price (30%)			
	Bidder 1	Bidder 2	Bidder 3



Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	$115/135 \times 70 = 59.63$	$89/135 \times 70 = 46.15$	$92/135 \times 70 = 47.70$
	Pricing Score	$45/55 \times 30 = 24.54$	$45/50 \times 30 = 27.00$	$45/45 \times 30 = 30.00$
Combined Rating		84.17	73.15	77.7
Overall Rating		1st	3rd	2nd



PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

5.1 Certifications Required with the Bid

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

5.1.1 Declaration of Convicted Offences

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

5.2 Certifications Precedent to Contract Award and Additional Information

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

5.2.1 Integrity Provisions – List of Names

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

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

Name of Bidder: _____

OR

Name of each member of the joint venture:

Member 1: _____



Member 2: _____
Member 3: _____
Member 4: _____

Identification of the administrators/owners:

SURNAME	NAME	TITLE

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](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 [Employment and Social Development Canada \(ESDC\) - Labour's](#) website.

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

5.2.3 Status and Availability of Resources

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

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

5.2.4 Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work



history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

5.2.5 Former Public Servant

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

Definitions

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

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

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

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

Former Public Servant in Receipt of a Pension

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

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

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



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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

Professional fees	Amount
_____	_____
_____	_____

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

5.2.6 Aboriginal Designation

Who is eligible?

- a) An Aboriginal business, which can be:
 - i. a band as defined by the Indian Act
 - ii. a sole proprietorship
 - iii. a limited company
 - iv. a co-operative
 - v. a partnership
 - vi. a not-for-profit organization

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



OR

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

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

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

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



PART 6 - SECURITY REQUIREMENTS

There is no security requirements associated with this requirement.



PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 Statement of Work

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

7.2 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual)(<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](#) (2018-06-21), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

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

7.2.2 Supplemental General Conditions

The following clauses apply to this contract:

[4006](#) (2010-08-16), Contractor to Own Intellectual Property Rights in Foreground Information

7.3 Dispute Resolution

Mediation

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

Arbitration

If the parties cannot resolve the dispute through mediation within sixty (60) days, the parties agree to submit the dispute to arbitration pursuant to the Commercial Arbitration Act (Canada). The party requesting such arbitration shall do so by written notice to the other party/parties. The cost of the arbitration and fees of the arbitrator shall be borne equally by the parties. The arbitration shall take place in the city where the contractor carries on business before a single arbitrator to be chosen jointly by the parties. If the parties cannot agree on the choice of arbitrator within thirty (30) days of written notice to submit the dispute to arbitration, each party will choose a representative who will select the arbitrator. The parties may determine the procedure to be followed by the arbitrator in conducting the proceedings, or may ask the arbitrator to do so. The arbitrator shall issue a written award within thirty (30) days of hearing the parties. The award may be entered in any court having jurisdiction and enforced as a judgment of that court.

Meaning of "Dispute"



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

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

7.4 Security Requirements

7.4.1 There is no security requirement applicable to this Contract.

7.5 Term of Contract

7.5.1 Period of the Contract

The period of the Contract is from date of Contract to September 31, 2019 inclusive.

7.6 Comprehensive Land Claims Agreements (CLCAs)

Not applicable.

7.7 Authorities

7.7.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Len Pizzi
Title: Senior Procurement Officer
Organization: Natural Resources Canada
Address: 183 Longwood Road South, Hamilton, ON, L8P 0A5
Telephone: (905) 645-0676
Facsimile: (905) 645-0831
E-mail address: len.pizzi@canada.ca

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

7.7.2 Project Authority (to be provided at contract award)

The Project Authority for the Contract is:

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



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

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

Name:

Title:

Organization:

Address:

Telephone:

Facsimile:

E-mail address

7.8 Proactive Disclosure of Contracts with Former Public Servants

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

7.9 Payment

7.9.1 Basis of Payment – Firm Price, Firm Unit Price(S) or 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 price, as specified in Annex "B" for a cost 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.

7.9.2 Method of Payment

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.

7.10 Invoicing Instructions

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

E-mail:

nrcan.invoiceimaging-servicedimageriedesfactures.mcan@canada.ca

Note: Attach "PDF" file. No other formats will be accepted



OR
<p><u>Fax:</u></p> <p>Local NCR region: 613-947-0987 Toll-free: 1-877-947-0987</p> <p>Note: Use highest quality settings available.</p>

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

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

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

7.11 Certifications

7.11.1 Compliance

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

7.12 Applicable Laws

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

7.13 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions 4006 - Contractor to Own Intellectual Property Rights in Foreground Information (2010-08-16);
- (c) the general conditions 2035 - Higher Complexity – Services (2018-06-21);
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment; and
- (f) the Contractor's bid dated _____.

7.14 Foreign Nationals (Canadian Contractor **OR Foreign Contractor)**

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

OR

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



7.15 Insurance

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

7.16 Contract Administration

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



ANNEX “A” - STATEMENT OF WORK

SW.1.0 TITLE

Medium-Term Energy Policy Options for Canada

SW.2.0 BACKGROUND

Global energy systems are undergoing a period of profound change, driven by mutually-reinforcing climate policy and technological innovation, and Canada’s energy system is no exception. Efforts to reduce greenhouse gas emissions have to a large extent focused on the energy system, as this is the largest global and national source of such emissions. As climate policy supports clean technology, and vice versa, the pace of change is continually accelerating. These changes are having other effects in Canada’s energy sector, such as on employment opportunities in different energy sub-sectors and industrial competitiveness, with wider socio-economic implications for all Canadians.

The Government of Canada has engaged key Canadian stakeholders and the general public in recent years to explore these issues, including through the Economic Strategy Tables, the Joint Oil and Gas Working Group, and Generation Energy. These processes have helped to solicit near- to long-term ideas of what Canada needs to do to advance its energy sector. There remains scope to consider how Canada could best take up these measures, including understanding the trade-offs they entail and different ways to achieve shared goals.

Beyond identifying technological, economic, and policy/regulatory options needed to adapt to a changing energy landscape, it is also important for Canadians to understand the central problems that these options seek to address and that, despite the changes that are occurring and will continue to occur, Canadians can continue to enjoy high levels of well-being for decades to come. Gaining broad understanding of a suite of policies to address these changes can improve their effective implementation.

As the Government of Canada’s lead department for energy policy, Natural Resources Canada (NRCan) has therefore identified the need for an external Contractor to convene and seek the views of Canadian energy experts on near- to medium-term policy options for the energy sector and to communicate these findings to inform public debate. The ideal Contractor for this work will have conducted recent research pertaining to changes across the energy sector and the associated socio-economic implications, including through broad-based consultations, be able to access expert thought leaders across the energy issue spectrum, and connect this work to a wider national dialogue to engage as many Canadians as possible. In order to be inclusive of all Canadians on a politicized issue, the Contractor must have a reputation as non-partisan.

SW.2.1 Language of Final Products

As the products contracted are intended to inform both Canadian governments and the broader Canadian public on these issues, they are to be made available, at the same time, in both English and French.

SW.3.0 OBJECTIVES

In order to address the above changes in the energy sector – including the interplay of technological innovation, consumer/citizen sentiment, falling renewables prices, projected electricity demand growth, and geo-political and geo-economic forces – Canadians and policymakers need to address the overarching question of “What will it take for Canada, as a global leader in energy, to retain a leading position while managing change?” This project is intended to contribute meaningfully to public dialogue on this broad question through a series of further questions (subject to refinement) on key elements of the energy system, such as:



1. How can Canada promote best-in-the-world clean oil and gas extraction as part of a diversified, technology-driven approach to building a competitive energy sector on carbon and cost measures? What should a diversified energy strategy look like in a world of uncertain oil demand, increased carbon concerns, and the maturing of clean energy? How do oil and gas resources fit into such a system? In what ways can public revenues from the oil and gas industry be used to fund needed system change, and what will change look like? How does Canada stay ahead throughout this period of transition?
2. What is the potential of clean energy, including hydro, nuclear, and new renewables, in Canada's energy future? How can Canada meet increased electricity demand and brand itself around its clean energy abundance? Where would electricity infrastructure interconnection (such as interties) versus decentralized/distributive models (such as small hydro and small modular reactors) work best? How can Canada extract greater long-term strategic value out of its electricity resources and ameliorate future political/economic risk?
3. How does a more diversified, technologically advanced energy sector change the amount and type of labour required, and what opportunities exist for skills development and greater inclusion? What lessons can be learned from changes in other industries or countries and applied to the energy sector?
4. How can the energy system be developed in closer partnerships with Indigenous peoples? What opportunities will Indigenous peoples have to benefit from transition to new energy sources? What are the fiscal implications? What can Canada learn from successful and unsuccessful models to encourage partnerships and, when appropriate, accommodate effects on rights? Is the legal regime around rights evolving to the point of bringing greater certainty to energy projects, and how can that be facilitated?
5. What are the most efficient and effective governance arrangements with respect to the energy sector? How can federal, provincial, territorial, Indigenous, and municipal governments best coordinate policy, while recognizing regional differences and leaving room for policy experimentation? Especially with respect to environmental policy (e.g., carbon pricing, environmental assessment and regulation), how can it be ensured that all Canadians contribute their fair share to national objectives (e.g., the Paris Agreement, threatened species protection) despite their policy, geographic, and industrial differences?

Expert consultation on these topics will shape the creation of a range of policy products that can inform governments and the Canadian public in their thinking about the country's energy future. Products will vary in level of accessibility so as to allow the findings to reach the widest possible audience

SW.4.0 PROJECT REQUIREMENTS

SW.4.1 Tasks, Deliverables, Milestones and Schedule

NRCan will engage in an iterative process with the Contractor that allows for interaction in the development of the deliverables. In consultation with NRCan, the Contractor will establish an advisory committee to identify key lines of enquiry Canada's energy system. The advisory committee will in turn convene a diverse and inclusive selection of relevant Canadian experts who can advance the national conversation around those questions, and help to identify potential policy responses that could be taken over the course of the next four to five years. The experts should have the opportunity to meet together with a representative sample of Canadians to challenge and refine their ideas. Once the full, short, and one-page summary papers are prepared, media products will be designed to promote their key findings. The following table lists the main tasks and milestones.



Tasks/Activities	Deliverables/Milestones	Time Schedule (from award of contract)
Selection of advisory board	Advisory board established	1 week
Selection of paper topics	Policy paper topics confirmed	3 weeks
Selection of expert authors	Expert authors confirmed	5 weeks
Stakeholders' workshop	Diverse group of stakeholders to meet with authors to discuss, challenge, and provide views on policy papers	8 weeks
Drafting of policy papers	Draft papers	14 weeks
Creation of media products (e.g., video clips)	Draft media products	17 weeks
Identify release partners	One or more thought-leading organization(s) identified to mirror the release of papers and media products	18 weeks
Revisions to policy papers	Final papers	20 weeks
Revisions to media products	Final media products	20 weeks

SW.4.2 Reporting Requirements

This project is expected to be delivered on time and on budget through adherence to the schedule in SW4.1. Any anticipated deviations from this schedule will be reported to NRCan as soon as they are realized in order to make any adjustments needed to respect the final deadline.

SW.4.3 Method and Source of Acceptance

All deliverables rendered under this contract are subject to inspection by NRCan, which shall have the right to reject any deliverables that are not considered satisfactory, or require their correction before payment will be authorized.

SW.4.4 Specifications and Standards

Different deliverables to engage different audiences will be created as follows:

- Full-length research papers (ca. 2400 words each);
- Condensed research papers (ca. 1200 words each);
- One-page summaries and recommendations (400-600 words each); and
- Short social media videos (advertisement or 30 seconds in length each).



SW.5.0 OTHER TERMS AND CONDITIONS OF THE SOW

SW.5.1 Contractor's Obligations

In addition to the obligations outlined in Section 2 of this Statement of Work, the Contractor shall:

- participate in meetings/teleconferences with NRCan as needed;
- provide guidance to expert authors and stakeholders to align their work with deliverable specifications;
- submit all written papers in hard copy and electronic Microsoft Office Word format; and
- submit electronic versions of media products in their original format.

SW.5.2 NRCan's Obligations

NRCan will work with the Contractor at key points in the process in order to ensure that the deliverables will be able to meet the quality requirements expected. Such involvement will include:

- selection of members for an advisory committee;
- selection of topics to be considered in policy papers;
- identification of relevant experts to write policy papers;
- review and comment on drafts of policy papers; and
- review and comment on initial media products.

A point of contact in NRCan will be available throughout the contract to allow ongoing communication with the Contractor.

SW.5.3 Location of Work, Work Site and Delivery Point

The Contractor shall use its own, or sub-contracted, facilities and equipment for the conduct of the meetings, workshop(s), preparation of reports, and creation of media products.

SW.6.0 REQUIRED RESOURCES OR TYPES OF ROLES TO BE PERFORMED

The advisory committee members will be composed of NRCan and Contractor representatives and experts who have considerable, overarching expertise in the technical, social, and political elements of energy policy in Canada. The collective expertise of the advisory committee will enable it to select expert authors to write the five policy papers. These authors will be more specialized in their area of authorship than the advisory committee members and have the credibility needed for their work to be considered reputable by a broad range of Canadians, governments, and industries.



ANNEX "B" - BASIS OF PAYMENT

(to be completed at contract award)



APPENDIX “1” - EVALUATION CRITERIA

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

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

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

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

1. TECHNICAL CRITERIA

1.1 MANDATORY EVALUATION CRITERIA

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

Criterion ID	Mandatory Criteria	Proposal Page #	Pass/Fail
M1	<p>The Bidder MUST have recently¹ convened a diverse, inclusive, nation-wide stakeholder community and proved a research and consultation process that led to a broad series of papers on Canadian policy issues.</p> <p>The Bidder MUST provide three (3) sample papers that demonstrate the quality of products that would be prepared for the current contract.</p> <p>NRCan reserves the right to contact the papers’ authors and participants of the consultation processes to verify the nature of the consultations and the integration of those processes into the final papers.</p> <p>¹ “Recently” is defined as providing these services within the previous eighteen (18) months.</p>		



Criterion ID	Mandatory Criteria	Proposal Page #	Pass/Fail
M2	<p>The Bidder MUST have recently held a national-level Canadian dialogue, using qualified thought leaders² to support this process, and be available to meet the requirements in Section 5 of the Statement of Work by drawing on a network of such experts and representative stakeholders.</p> <p>The Bidder MUST provide a list of at least five (5) potential thought leaders who are known to be available and interested in participating in the current contract.</p> <p>In support of the Statement of Work’s requirement that products be produced in both official languages, the Bidder should have the ability to engage stakeholders in the language of their choice during the dialogue process.</p> <p>² “Thought leaders” are recognized by professional colleagues, awards, etc. as prominent experts within their area of research.</p>		
M3	<p>The Bidder MUST have experience engaging groups of different stakeholder communities, including federal, provincial, or municipal governments, industry, workers, investors, Indigenous, women, and general Canadians, in formal, national consultative projects and processes³.</p> <p>³ Testimonials may be sought from participants of past engagement sessions to assess their experiences at those events.</p>		
M4	<p>The Bidders MUST identify one or more release partners with wide reach to Canadian audiences who will mirror and assist with the promotion of the materials developed under this contract.</p> <p>A release partner is defined as other organizations that will agree to actively amplify (i.e. share and promote) the deliverables.</p>		

1.2 EVALUATION OF RATED CRITERIA

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

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

Proposals will be evaluated based on the following criteria:

Criterion ID	Point Rated Technical Criteria	Minimum Points	Proposal Page #
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		/Maximum Points	
R1	<p>Sample Papers</p> <p>For policy papers, each of the three (3) submitted sample papers provided in response to Mandatory Requirement 1 will be evaluated against their overall quality and on the relevance, similarity, and applicability to NRCan's requirement.</p> <p>The sample papers will be evaluated against the following factors:</p> <ol style="list-style-type: none"> 1. Demonstration of comprehensive and accurate consideration of policy issues and logical, evidence-based conclusions inclusive of views articulate in public consultations; 2. 'Look and feel' that renders the papers appealing and approachable for members of a generalized Canadian audience, including written or video summaries of the papers; 3. Inclusion of infographics or charts that effectively highlight and summarize underlying quantitative or data considerations in the paper; 4. Exposition of policy options or proposals in a way that is non-partisan/apolitical allowing consideration by all Canadians regardless of political affiliation; 5. Quality of writing, including clear exposition of technical/scientific issues for ease of readability by a generalized public audience. <p>Full or half points will be awarded for each of the five evaluation factors, as detailed below, with a maximum of 5 points for each of the three sample papers.</p> <p>Points will be awarded based on the following:</p> <p>Factor 1 1 point = considers an appropriate range of options 0.5 points = leaves out key policy considerations 0 points = overly narrow, single-consideration paper</p> <p>Factor 2 1 point = visually appealing, modest length (<2500wds) 0.5 points = lacking in presentation and/or editing 0 points = all-text, overly long, or daunting presentation</p> <p>Factor 3 1 point = good visual representation of key findings 0.5 points = low-quality or difficult to understand visuals 0 points = paper lacks visual representations</p>	15	



	<p>Factor 4 1 point = cordial tone that appeals to all Canadians 0.5 points = selective presentation skews analysis 0 points = politicized, ideological, or antagonistic tone</p> <p>Factor 5 1 point = clear, grammatical, readily-understandable 0.5 points = overly academic or jargon-laden 0 points = poor writing quality or highly technical</p> <p>A maximum of 15 points can be awarded.</p>		
R2	<p>National Dialogue Experience</p> <p>The Bidder should demonstrate experience in convening a national-level dialogue of representative Canadians with expert thought-leaders to analyze and assess policy issues of current relevance to Canadians.</p> <p>1 point for geographic breadth of dialogue</p> <p>1 point inclusiveness of participants</p> <p>2 points for participation by thought leaders</p> <p>2 points for network of potential thought leaders to participate in the current contract</p> <p>4 points for retaining structural elements from a previous dialogue that would assist in the conduct of the current contract.</p> <p>A maximum of 10 points can be awarded.</p>	10	
R3	<p>Experience Convening Canadians</p> <p>The Bidder should demonstrate experience in convening Canadians to discuss and analyze current policy issues.</p> <p>1 point for each policy project conducted in the last ten (10) years that deliberately spanned multiple stakeholder groups and/or geographic regions in Canada to solicit policy perspectives, to a maximum of 5 points.</p>	5	
R4	<p>The Bidder's final products will be released in tandem with or mirrored by one or more supporting organizations in order to achieve wide public reach.</p> <p>Each potential release partner will be evaluated on the following factors:</p> <p>2 points: breadth of reach to a wide cross-section of Canadians</p> <p>2 points: connections to other organizations</p>	5	



	<p>1 point: overall profile of organization</p> <p>For a total of 5 points per potential release partner.</p>		
Total points		35	

2. FINANCIAL CRITERIA

2.1 FUNDING LIMITATION

The maximum funding available for the Contract resulting from the bid solicitation is \$ 155,000.00 (Applicable Taxes extra). Bids valued in excess of this amount will be considered non-responsive. This disclosure does not commit Canada to pay the maximum funding available.

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

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



APPENDIX “2” – FINANCIAL PROPOSAL FORM

1. FIRM PRICE - Milestone Payments

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

The bidder must complete the schedule below indicating the firm proposed amounts for each step according to the indicated percentages:

Milestone #	Description of Milestone	Milestone Firm Price (applicable taxes excluded)
1	Drafting of policy papers – 35% of bid	\$ _____
2	Final papers / Final media products – 65% of bid	\$ _____
Total Firm Price for Financial Proposal Evaluation:		\$ _____