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

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



PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

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

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

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

Part 5 Certifications: includes the certifications to be provided;

Part 6 Security Requirements: includes specific requirements that must be addressed by bidders; and

Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work, the Basis of Payment, and the Security Requirements Checklist.

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 to undertake a study to identify market demand, as well as barriers and opportunities for energy storage technologies in Canada, and to document potential avenues for federal policy action.

1.2.2 "There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, bidders should refer to the [Industrial Security Program \(ISP\)](http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website".

1.3 Trade Agreements

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

1.4 Debriefings

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



PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

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

The 2003 (2019-03-04) 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 – Integrity Provisions – Bid):

DELETE: Public Works and Government Services Canada (PWGSC)

INSERT: Natural Resources Canada (NRCan)

In Section 2 – Procurement Business Number:

DELETE: “Suppliers are required to”

INSERT: “It is suggested that suppliers”

In Section 5.4 – Submission of Bids:

DELETE: sixty (60) days

INSERT: one hundred and twenty (120) days

In Section 8.1 – Transmission by Facsimile:

DELETE: 819-997-9776

INSERT: Bids not accepted by fax

In Section 20.2 – Further Information:

DELETE: in its entirety, not applicable

2.2 Submission of Bids

It is the Bidders responsibility to ensure that proposals are delivered to the following location, by the time and date indicated on page 1 of this RFP document:

Natural Resources Canada
Bid Receiving Unit- Loading Dock Address
588 Booth Street, Room 108
Ottawa, Ontario K1A 0Y7
Attention: **Kaeli McCarthy**

It is requested that the Bidder’s name, return address, Request for Proposal Number, and Bid Closing Date appear legibly on the outside of the envelope containing the Bidder’s proposal. Failure to do so may result in bids being misdirected. **NRCan will not assume responsibility for proposals directed to any other location.**

The onus is on the Bidder to ensure that the proposal is delivered to the location above. 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.



It is the Bidders responsibility to ensure that proposals are sent by the time and date indicated on page 1 of this RFP document.

2.3 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than eight 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 seven 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 soft copy on flash drive, CD, or DVD)
- Section II: Financial Bid (1 soft copy on flash drive, CD, or DVD) **in a separate file**
- Section III: Certifications (1 soft copy on flash drive, CD, or DVD)
- Section IV: Additional Information

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 formatting 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.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, Bidders should:

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

Section I: Technical Bid

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

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

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; and
 - c. obtain the required minimum of 70 overall for the technical evaluation criteria which are subject to point rating.
The rating is performed on a scale of 100 points.
2. Bids not meeting "(a), (b) and (c)" will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

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



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	77.70
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.

Note: Bidders are only required to fill out this form if they have been convicted of a criminal offence.

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**" means a 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 and includes:

- (a) An individual;
- (b) An individual who has incorporated;
- (c) A partnership made up of former public servants; or
- (d) 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 Public Service.

"**Pension**" means, in the context of the fee abatement formula, 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 (FPS) in Receipt of a Pension

Is the Bidder a FPS in receipt of a pension as defined above? **YES ()** **NO ()**

If so, the Bidder must provide the following information:

(a) Name of former public servant:

(b) Date of termination of employment or retirement from the Public Service.



Work Force Reduction Program

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program?

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: _____
 Number of weeks: _____
- (g) Number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

Contract Number:

Contract Amount:

For all contracts awarded during the lump sum payment period, the total amount of fee that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.

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.

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



PART 6 - SECURITY REQUIREMENTS

6.1 Security Requirements

1. Before award of a contract, the following conditions must be met:
 - (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
 - (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;
 - (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
2. Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
3. For additional information on security requirements, Bidders should refer to the [Industrial Security Program \(ISP\)](http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.



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).

7.3 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 The following security requirements (*SRCL and related clauses provided by ISP*) apply and form part of the Contract.

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding at the level of **Protected B**, issued by the Canadian Industrial Security Directorate(CISD), Public Works and Government Services Canada (PWGSC)
2. The Contractor/Offeror personnel requiring access to protected information, assets or work site(s) must EACH hold a valid **Reliability Status**, granted or approved by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC)
3. The Contractor must not utilize its Information Technology systems to electronically process, produce or store protected information until the CISD/PWGSC has issued written approval. After approval has been granted or approved, these tasks may be performed up to the level of **Protected B**
4. Subcontracts which contain security requirements are not to be awarded without the prior written permission of CISD/PWGSC
5. The Contractor/Offeror must comply with the provisions of the:
 - a) Security Requirements Check List and security guide (if applicable), attached at Annex
 - b) Industrial Security Manual (Latest Edition)

7.5 Term of Contract

7.5.1 Period of the Contract

The period of the Contract is from date of Contract award to March 31, 2020

7.5.2 Delivery Date

All the deliverables must be received on or before March 31, 2020

7.6 Authorities

7.6.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: **Kaeli McCarthy**
Title: Procurement Specialist
Organization: Natural Resources Canada



Address: 580 Booth Street, 5th Floor, Ottawa Ontario, K1A 0E4
Telephone: 343-292-6693
Facsimile: 613-947-5477
E-mail address: Kaeli.Mccarthy@canada.ca

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

7.6.2 Project Authority

The Project Authority for the Contract is: (to be inserted at contract award)

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

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

7.6.3 Contractor's Representative

The contractor's representative for the Contract is: (to be inserted at contract award)

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

7.7 Proactive Disclosure of Contracts with Former Public Servants

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

7.8 Payment

7.8.1 Basis of Payment – Firm Price

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



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

7.8.2 Method of Payment

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:
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.

7.9 Invoicing Instructions

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

<p><u>E-mail:</u></p> <p>nrcan.invoiceimaging-servicedimageriedesfactures.nrcan@canada.ca</p> <p>Note: Attach "PDF" file. No other formats will be accepted</p>
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: _____ **(to be inserted at contract award)**

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

7.10 Certifications

7.10.1 Compliance

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



7.11 Applicable Laws

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

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.

7.12 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) [4006](#) (2010-08-16) - Contractor to Own Intellectual Property Rights in Foreground
- (c) the general conditions [2035](#) (2018-06-21), Higher Complexity – Services
- (d) Annex A, Statement of Work
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List
- (g) the Contractor's bid dated _____, *(to be inserted at contract award)*

7.13 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)

7.14 Insurance Requirements

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

7.15 Contract Administration

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



ANNEX “A” - STATEMENT OF WORK (SOW)

Title: Study on the Energy Storage Market in Canada

SW1: Objective

The purpose of this contract is to undertake a study to identify market demand, as well as barriers and opportunities for energy storage technologies in Canada, and to document potential avenues for federal policy action.

SW2: Background

Global demand for electric vehicles and energy storage solutions is projected to increase over the coming decades. These technologies will be critical to address climate change, reduce the environmental impacts of energy use and create economic opportunities and clean jobs.

As world-leading electric vehicle manufactures and energy storage companies are making historic investments around the world, Canada has an opportunity to leverage and develop existing strengths in order to establish itself along the value chain. A central priority for Canada, beyond fostering a robust, export-focused energy storage industry, is to drive the adoption of these energy storage technologies within Canada. As such, the federal government is deeply interested in developing its knowledge of Canada’s potential for energy storage, how that differs by technology type, use-case, jurisdiction, and to identify necessary actions to foster domestic adoption of energy storage where applicable.

SW3 Report outline

SW3.1 Part I – Technology Overview

This section will provide an overview of energy storage technologies and the services they are capable of providing, by market segment, domestically and internationally. The term *market segment* refers to three sectors: residential, ICI (Institutional, commercial, industrial) and grid scale (utilities, Independent power producers, etc.). In preparation for this section as well as Part III, consideration may be given to the following resources:

- IEA Energy Storage Roadmap:
 - <https://www.iea.org/publications/freepublications/publication/TechnologyRoadmapEnergyStorage.pdf>
- NRC Canadian Energy Storage Roadmap:
 - Document provided upon contract award

It is estimated that Part I will represent approximately 10% of the study.

SW3.2 Part II – Market Analysis

This section shall address and identify the size, both current and projected over the next 5 and 10 years, of Canada’s energy storage market. This analysis will answer the following questions:

- What is the size of the energy storage market in Canada today? (detailed analysis broken down by the three market segments identified in Part I)
- How does the current market differ by jurisdiction? *
- What is the growth potential of Canada’s energy storage market by market segment and jurisdiction (short-term (1-2 years); 5 and 10 year time-frame)



- Who are the domestic and international suppliers of energy storage technologies that could service Canada's market?

It is estimated that Part II will represent approximately 30% of the study.

** The Contractor may want to focus on representative regional contexts by presenting case studies that can be used to extend learnings to similar jurisdictions. As an example only, the analysis could focus on Ontario (hybrid market), Alberta (fully deregulated market) and two or more illustrative vertically integrated markets such as British Columbia (West) and Nova Scotia (East). Alternatively, jurisdictional case studies could be chosen by assessing the supply mix of a given province/territory (e.g. hydro dominant, variable renewable dominant, fossil fuel dominant, nuclear, etc.) – as the dynamics associated with a jurisdictions supply mix may inform their market for energy storage.*

SW3.2 Part III – What is possible in Canada?

Part III of this report will outline the key success factors and potential barriers to Canada's energy storage market, as well as which energy storage technologies can provide the services required to address the market segments outlined in part I of the report.

To this end, Part III shall include a detailed analysis of the critical elements of a business case at both the project and system/grid level. This section shall include project specific analysis of the technical and regulatory requirements, economics and costs of the energy storage service, as well as revenue streams in a Canadian context.

Part III shall also provide information on alternatives to energy storage (e.g. flexible natural gas), where possible, by market segments and jurisdiction.

Finally, Part III shall identify and document technical and regulatory gaps, as well as options for public policy action at both the federal and provincial level, if required. Policy options shall be documented and substantiated through detailed analyses of the technical, economic and financial aspects of typical small-medium- and large-scale energy storage projects through 8-10 real or projected applications in various settings and jurisdictions. The section shall conclude with recommendations on policy options to encourage adoption of these technologies.

It is estimated that Part III will represent approximately 40% of the study.

SW3.3 Part IV – Final Report and Deliverables

The Contractor shall submit a final report, an executive summary, and a PowerPoint presentation of a length and format as determined by the Project Authority. The Contractor shall also make available to the Project Authority all data, economic and financial information used in the drafting of the final deliverables. It is estimated that Part IV will represent approximately 20% of the study.

SW4 Deliverables

The contractor must produce the following deliverables:



No.	Deliverable	Content	Format	Estimated Task Duration*	Total Project Duration*
4.1	Kick-off meeting and work plan	The Contractor and Project Authority must have a kick-off meeting where the Project Authority will provide comments on the project outline and overall project expectations and the Contractor must state their intentions in addressing each part of the study. Following the kick-off meeting, the Contractor must provide an updated and detailed work plan with resource allocation by tasks. Approx. 2 person-days	Audio or video conference for the meetings; ongoing by email	Work plan available within 2 weeks of kick-off meeting	1 week
4.2	Draft outline for Part I	The Contractor must provide a draft annotated outline of Part I of the report. Approx. 3 person-days	MS Word	1 weeks	2 weeks
4.3	Advanced Draft of Part I	Advanced draft of Part I Approx. 10 person-days	MS Word	2 weeks	4 weeks
4.4	Draft outline for Part II	The Contractor must provide a draft annotated outline of Part II of the report. Approx. 5 person-days	MS Word	1 weeks	5 weeks
4.5	Advanced Draft of Part II	The Contractor must provide a draft version of Part II of the report. Approx. 25 person-days	MS Word	4 weeks	9 weeks
4.6	Draft outline for Part III	The Contractor must provide a draft annotated outline of Part III of the report. Approx. 5 person-days	MS Word	1 weeks	10 weeks
4.7	Advanced Draft of Part III - Final report	The Contractor must submit a final draft of the complete report that addresses all previous comments as agreed. It will include a draft Executive Summary and final presentation. Approx. 35 person-days	MS Word; MS Power Point	5 weeks	15 weeks
4.8	Part IV - Final report with revisions	The Contractor must provide a final version of all deliverables. Approx. 10 person-days	MS Word; MS Power Point; Excel	1 weeks	16 weeks

*Tasks and project duration includes time for Project Authority's review and commenting.

*One person-day is defined as \$1000.00/day



ANNEX "B" - BASIS OF PAYMENT

To be inserted at contract award



ANNEX "C" - SECURITY REQUIREMENTS CHECK LIST

POV ticket # 154967 19-194
COMMON-PS-SRCL#9 PR# 500047634

Government of Canada / Gouvernement du Canada

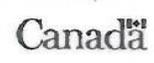
Contract Number / Numéro du contrat
Security Classification / Classification de sécurité UNCLASSIFIED

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine: Natural Resources Canada Energy Sector / Direction générale ou Direction
2. Branch or 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: Some professional services to undertake a study on the energy storage market in Canada
5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées? [X] No / Non [] 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? [X] No / Non [] Yes / Oui
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? [] No / Non [X] Yes / Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? / Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? [X] No / Non [] 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? [X] No / Non [] 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 [X] NATO / OTAN [] Foreign / Étranger []
7. b) Release restrictions / Restrictions relatives à la diffusion
No release restrictions / Aucune restriction relative à la diffusion [X]
Not releasable / À ne pas diffuser []
Restricted to: / Limité à: []
Specify country(ies) / Préciser le(s) pays: []
7. c) Level of information / Niveau d'information
PROTECTED A / PROTÉGÉ A [X]
PROTECTED B / PROTÉGÉ B [X]
PROTECTED C / PROTÉGÉ C []
CONFIDENTIAL / CONFIDENTIEL []
SECRET []
TOP SECRET / TRÈS SECRET []
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) []
NATO UNCLASSIFIED / NATO NON CLASSIFIÉ []
NATO RESTRICTED / NATO DIFFUSION RESTREINTE []
NATO CONFIDENTIAL / NATO CONFIDENTIEL []
NATO SECRET []
COSMIC TOP SECRET / COSMIC TRÈS SECRET []
PROTECTED A / PROTÉGÉ A []
PROTECTED B / PROTÉGÉ B []
PROTECTED C / PROTÉGÉ C []
CONFIDENTIAL / CONFIDENTIEL []
SECRET []
TOP SECRET / TRÈS SECRET []
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) []

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité UNCLASSIFIED





PP1/P1

19-194

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PART A (continued) / PARTIE A (suite)

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

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? No / 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 :		

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

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

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité
UNCLASSIFIED





19-199

COMMON-PS-SRCL#9



Government of Canada
Gouvernement du Canada

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

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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				CONSEC					
	A	B	C	CONFIDENTIAL	Secret	TOP SECRET	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COMINT TOP SECRET / COMINT TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET / TRÈS SECRET
							NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL	A		B	C				
Information / Assets / Renseignements / Biens		✓														
Production																
IT Media / Support TI		✓														
IT Link / Lien informatique																

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).



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.

A single company/firm or a consortium of companies is eligible for this study. Consortium bids must identify a Project Leader, who will be the contact for the Project Authority throughout the study and will be responsible for managing the Consortium and for submitting various deliverables of the study on behalf of the Consortium. Payments will be made to the company of the Project Lead, which will be responsible for allocating the payments between consortium members.

The proposal, which must include a detailed work plan and allocation of resources, shall address clearly and in sufficient depth the points that are subject to the mandatory and point-rated requirement criteria against which the proposal will be evaluated in a separate section of the proposal. Simply repeating the statements contained in the statement of work is not sufficient. In order to facilitate the evaluation of proposals, the Project Authority requests that the Contractor address and present topics in the order of the point-rated requirement criteria under the same headings. To avoid duplication, the Contractor may refer to different sections of their proposals by identifying the specific paragraph and page number where the subject topic has already been raised.

When referencing the company's or companies' previous experience, as part of the Mandatory Requirements or point-rated evaluation criteria, the bid must specifically demonstrate how previous projects relate to renewable energy deployment policies, in general, and to renewable energy procurement mechanisms and required electricity markets regulatory measures, in particular.

When referencing team member's previous experience, as part of the Mandatory Requirements or point-rated evaluation criteria, the bid must specifically demonstrate how individual team member's previous experience relates to storage or related energy deployment policies, in general, and to energy procurement mechanisms and required electricity markets regulatory measures, in particular.



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.

E1 Basis of selection

E1.1 To be declared responsive, a bid must:

- (a) comply with all the administrative requirements (*identified in this bid solicitation document*);
- (b) comply with all of the mandatory technical criteria (*identified in section 2 below*); and
- (c) obtain the required minimum aggregate points for the point-rated technical criteria (*identified in section 3 below*).

E1.2. The responsive bid with the highest combined technical merit and price (70% technical merit and 30% price) will be recommended for contract award.

E2 Mandatory requirements

E2.1. The bid must satisfy all of the mandatory technical criterion specified below to be deemed responsive.

E2.2. The Bidder must provide documented substantiation that sufficiently supports claims of compliance with each criterion. Each criterion should be addressed separately.

Item	Mandatory Requirement	Compliant (Yes/No)	Reference to Bidder's Proposal
M1	The Bidder must have past experience in conducting studies related to the examination of related and relevant energy issues at the national and international level	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M2	The bidder must demonstrate extensive knowledge of batteries, energy storage, and Canada's electricity systems. Considerable past experience is defined as having undertaken two or more projects related to the subjects above in the last five years. Extensive knowledge is defined as having 3 or more years of direct experience related to the topics above.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M3	The Project Team has <u>considerable</u> cumulative experience in undertaking studies of a complexity comparable to that proposed in the statement of work for national or sub-national governments (e.g. Provincial or Territorial Governments). Considerable past experience is defined as having undertaken two or more projects related to M1 and M2 in the last five years.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M4	The proposal identifies a detailed work plan for the entire study, which includes an explanation for the role	<input type="checkbox"/> Yes <input type="checkbox"/> No	



	and tasks of each Project Team or Consortium member and identifies the Project Leader for the Team or Consortium.		
M5	The proposal provides a detailed outline of the report , which follows the tasks outlined in Part I, II, III and IV of the Statement of Work at Annex A.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M6	The proposal shall be no longer than 18-20 pages in length . In addition, supplementary information, if needed, can be included in an annex. As well, the list of related previous projects and team members' resumés shall be provided in Annexes to the proposal.	<input type="checkbox"/> Yes <input type="checkbox"/> No	

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:

Point Rated Requirements:									
Item	Requirement	Max Points	Illustrated Compliance						
R1	<p>Previous Experience</p> <p>Points will be awarded to the Bidder's with previous project experience related to the examination of energy storage, battery and renewable energy issues at the national and international level, specifically clean energy technologies and electricity systems related to those projects, and how previous projects relate to this content. *Recent is defined as within the last ten years</p> <table border="1"> <thead> <tr> <th>Points</th> <th>Condition</th> </tr> </thead> <tbody> <tr> <td>25</td> <td>Excellent – the Bidder has undertaken 5 or more studies relating to energy storage/clean energy technologies and electricity systems</td> </tr> <tr> <td>23</td> <td>Good - the Bidder has undertaken 4 studies relating to energy storage/clean energy technologies and electricity systems</td> </tr> </tbody> </table>	Points	Condition	25	Excellent – the Bidder has undertaken 5 or more studies relating to energy storage/clean energy technologies and electricity systems	23	Good - the Bidder has undertaken 4 studies relating to energy storage/clean energy technologies and electricity systems	25	
Points	Condition								
25	Excellent – the Bidder has undertaken 5 or more studies relating to energy storage/clean energy technologies and electricity systems								
23	Good - the Bidder has undertaken 4 studies relating to energy storage/clean energy technologies and electricity systems								



Point Rated Requirements:															
Item	Requirement			Max Points	Illustrated Compliance										
	20	Fair - the Bidder has undertaken 3 studies relating to energy storage/clean energy technologies and electricity systems													
	17	Poor - the Bidder has undertaken 2 studies relating to energy storage/clean energy technologies and electricity systems													
R2	<p>Project Team Capacity</p> <p>Points will be awarded for proposals that demonstrate that the project team has the resources and sufficient personnel capacity available to undertake the research and analysis requirements for Part I, II and III of this study (as described in the Statement of Work at Annex A). It also identifies how project team members' previous work experience relates to the content expectations of this study. The Bidder should identify the project team and indicate the years of experience of each member.</p> <table border="1"> <thead> <tr> <th>Points</th> <th>Condition</th> </tr> </thead> <tbody> <tr> <td>25</td> <td>Excellent – the average number of years per-person of related experience across the Project Team is at least 10 years</td> </tr> <tr> <td>23</td> <td>Good - the average number of years per-person of related experience across the Project Team is at least 8 years</td> </tr> <tr> <td>20</td> <td>Fair – the average number of years per-person of related experience across the Project Team is at least 5 years</td> </tr> <tr> <td>17</td> <td>Poor - the average number of years per-person of related experience across the Project Team is less than 5 years</td> </tr> </tbody> </table>			Points	Condition	25	Excellent – the average number of years per-person of related experience across the Project Team is at least 10 years	23	Good - the average number of years per-person of related experience across the Project Team is at least 8 years	20	Fair – the average number of years per-person of related experience across the Project Team is at least 5 years	17	Poor - the average number of years per-person of related experience across the Project Team is less than 5 years	25	
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R3	<p>Understanding of Requirement</p> <p>Points will be awarded for a detailed work plan that demonstrates sufficient background knowledge of, and familiarity with, the issues surrounding the project content such that an estimate of the Contractor's likely success with the project can be formed.</p> <table border="1"> <thead> <tr> <th>Points</th> <th>Condition</th> </tr> </thead> <tbody> </tbody> </table>			Points	Condition	20									
Points	Condition														



Point Rated Requirements:														
Item	Requirement		Max Points	Illustrated Compliance										
	20	The work plan addresses all aspects and tasks of the work; the schedule and respects all the deadlines												
	17	The work plan addresses all key aspects of the work; but misses some details of the tasks, the schedule respects deadlines and is generally realistic												
	12	The work plan addresses all only some aspects of the work; the schedule respects deadlines but is generally not realistic												
	5	The work plan does not addresses key aspects of the work; the schedule does not respect deadlines or is not realistic												
R4	<p>Study Outline</p> <p>Points will be awarded to proposals that clearly convey the Bidders' intended approach for developing the study.</p> <table border="1"> <thead> <tr> <th>Points</th> <th>Condition</th> </tr> </thead> <tbody> <tr> <td>20</td> <td>The study outline comprehensively addresses all aspects of the mandate, is deemed to effectively achieve the mandate's objectives</td> </tr> <tr> <td>15</td> <td>The study outline comprehensively addresses all aspects of the mandate, is deemed to be moderately effective in achieving the mandate's objectives</td> </tr> <tr> <td>10</td> <td>The study outline addresses only some aspects of the mandate, is deemed to be only somewhat effective in achieving the mandate's objectives</td> </tr> <tr> <td>5</td> <td>The study outline does not address key aspects of the mandate, is not deemed to be effective in achieving the mandate's objectives</td> </tr> </tbody> </table>		Points	Condition	20	The study outline comprehensively addresses all aspects of the mandate, is deemed to effectively achieve the mandate's objectives	15	The study outline comprehensively addresses all aspects of the mandate, is deemed to be moderately effective in achieving the mandate's objectives	10	The study outline addresses only some aspects of the mandate, is deemed to be only somewhat effective in achieving the mandate's objectives	5	The study outline does not address key aspects of the mandate, is not deemed to be effective in achieving the mandate's objectives	20	
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R5	<p>Quality of the Proposal</p> <p>Points will be awarded for proposals that are written and organized in a clear and concise manner that is easily understood.</p> <table border="1"> <thead> <tr> <th>Points</th> <th>Condition</th> </tr> </thead> <tbody> <tr> <td>10</td> <td>Excellent – free from all errors, demonstrating excellent sentence structure and a clear and concise narrative</td> </tr> <tr> <td>8</td> <td>Good – free from all errors</td> </tr> <tr> <td>6</td> <td>Fair – free from most errors</td> </tr> <tr> <td>4</td> <td>Poor – errors distract from the quality of the work</td> </tr> </tbody> </table>		Points	Condition	10	Excellent – free from all errors, demonstrating excellent sentence structure and a clear and concise narrative	8	Good – free from all errors	6	Fair – free from most errors	4	Poor – errors distract from the quality of the work	10	
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8	Good – free from all errors													
6	Fair – free from most errors													
4	Poor – errors distract from the quality of the work													
Total Points Available			100											
Total Points needed to be considered Compliant (70%)			70											



- Excellent rating reserved for proposals with extensive level of details demonstrating an in-depth understanding of the requirements. Approach and work plan are clear, thorough, very rigorous and detailed.
- Good rating provided for proposals with considerable level details demonstrating a good understanding of the requirements. Approach and work plan are clear, thorough and detailed.
- Fair rating provided for proposals with adequate level of details demonstrating a fair understanding of the requirements. Approach and work plan are clear, but not accompanied with many details.
- Poor rating provided for proposals with insufficient details to demonstrate a fair understanding of the requirements. Approach and work plan is unclear and not accompanied with many



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	The Contractor and Project Authority must have a kick-off meeting where the Project Authority will provide comments on the project outline and overall project expectations and the Contractor must state their intentions in addressing each part of the study. Following the kick-off meeting, the Contractor must provide an updated and detailed work plan with resource allocation by tasks. (SW 4.1 for details)	10%
2	The Contractor must provide a draft annotated outline of Part I of the report. (SW 4.2 for details)	10%
3	Advanced draft of Part I (SW 4.4 for details)	30%
4	The Contractor must provide a draft annotated outline of Part II of the report. (SW 4.6 for details)	30%
5	The Contractor must submit a final draft of the complete report that addresses all previous comments as agreed. It will include a draft Executive Summary and final presentation (SW 4.7 for details)	30%
		100%

<u>TOTAL EVALUATED BID PRICE (HST EXCLUDED)</u>	
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