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**Quebec**

**K1A 0S5**

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

**SOLICITATION AMENDMENT  
MODIFICATION DE L'INVITATION**

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'invitation demeurent les mêmes.

**Comments - Commentaires**

**Vendor/Firm Name and Address**

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

**Issuing Office - Bureau de distribution**

Frigate Life Extension (FELEX) Project / Bureau de  
projet de prolongation de la vie des frégates (BP  
FELEX)

455 Blvd de la Carrière

Gatineau

Quebec

K1A 0K2

<b>Title - Sujet</b> HCCS IN-SERVICE SUPPORT		
<b>Solicitation No. - N° de l'invitation</b> W8482-168150/D		<b>Amendment No. - N° modif.</b> 008
<b>Client Reference No. - N° de référence du client</b> W8482-168150		<b>Date</b> 2019-11-26
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$FX-008-27388		
<b>File No. - N° de dossier</b> 008fx.W8482-168150	<b>CCC No./N° CCC - FMS No./N° VME</b>	
<b>Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2020-01-13</b>		<b>Time Zone</b> Fuseau horaire Eastern Standard Time EST
<b>F.O.B. - F.A.B.</b> Specified Herein - Précisé dans les présentes		
<b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input checked="" type="checkbox"/>		
<b>Address Enquiries to: - Adresser toutes questions à:</b> Fortin, Marie-Andrée		<b>Buyer Id - Id de l'acheteur</b> 008fx
<b>Telephone No. - N° de téléphone</b> (819) 939-3234 ( )		<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b>		

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

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**In-Service Support of the *Halifax*-class Combat Systems  
Request for Proposal – Questions and Answers  
Amendment no. 08**

This amendment is being issued to make changes to the HCCS RFP and to answer questions received against this solicitation.

**Part 1 – Amendment to the RFP:**

**1. Part 4 – Evaluation Procedures and Basis of Selection**

**4.3.4 - Industrial and Technological Benefits (ITB)/ Value Proposition Evaluation**

Please replace the ITB/VP Evaluation Plan with the updated version included in this amendment. The changes made to the document are highlighted in yellow.

**Part 2 - Questions and Answers:**

**Q171** - Amendment 6, A169: Canada's response has in fact made it necessary for Bidders to now provide both description of projects worked on AND a description of positions held and work performed including period of time (start and end dates – month and year). Was that Canada's intention, or can you please replace AND with OR?

**A171** - Canada requires Bidders to provide both: a description of projects worked on AND a description of positions held and work performed including period of time (start and end dates – month and year).

**Q172** - ITB Evaluation Plan, Section 4.1.3: This section describes how points are awarded specifically to marine in-service support activities, which is a very narrow scope for an indirect pillar. The intention of the skills development pillar is to create the Canadian talent necessary to perform "all" jobs an operation of this magnitude requires. Canada is requested to reconsider the definition in the Skills Development and Training Pillar, changing it from marine in-service support to defence and non-defence, as is already the case for the Research and Development or Defence Sector Pillars.

**A172** - Canada will maintain the requirements specified under the Skills Development and Training pillar.

**Q173** - Amendment 4, A154: Canada's response states that the value to be used to determine ITB/VP commitments would include: Management work in Canada; Emergent Work in Canada; Any other potential work done in Canada; Performance Incentives. The performance work statement defines both Management and Emergent Work. Other potential work done in Canada is not defined. It is requested that Canada define what is meant by "Other potential work done in Canada".

**A173** – Canada will not be defining "Other potential work done in Canada". Bidders are encouraged to put forward work opportunities that would align under this item.

N° de l'invitation - Solicitation No.  
W8482-168150/D  
N° de réf. du client - Client Ref. No.  
W8482-168150

N° de la modif - Amd. No.  
008  
File No. - N° du dossier  
008fx.W8482-168150

Id de l'acheteur - Buyer ID  
008fx  
N° CCC / CCC No./ N° VME - FMS

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**Q174** - RFP Annex C, Section 1: Canada is requested to confirm that invoicing for the Monthly Management Fee may begin one month after Contract Award. If this is not the case please define what is required before invoicing can commence.

**A174** – The Contractor can submit the invoice for the Monthly Management Fee one month after contract award.

**All other terms and conditions remain the same.**

# **HALIFAX-CLASS COMBAT SYSTEMS IN-SERVICE SUPPORT PROJECT**

**Industrial and Technological Benefits**

**Evaluation Plan**

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### **Halifax-Class Combat Systems In-Service Support Contract**

The Halifax-Class Combat Systems In-Service Support (HCCS ISSC) contract will provide support for each of the six (6) HCCS systems installed on the Halifax class frigates. Under this new approach, a single contract will be issued under which the Contractor will provide program management, support and coordinate with the OEMs for each of the HCCS systems who will continue to provide long term In-Service Support (ISS) for their systems.

For the purpose of the HCCS ISSC, the Industrial and Technological Benefits Policy (ITB) including Value Proposition (VP) will apply to all work performed by the Contractor but excluding the cost to the Contractor of the Work performed and the spare parts acquired outside of Canada for the Halifax-Class Combat Systems over a period of twelve (12) years. This approach will ensure that new work performed under this contract by the Contractor is fully leveraged and provides benefit to Canada, while recognizing that these are legacy systems with well-established supply chains. As such, the HCCS ISSC is not adjusting the In-Service Support arrangements currently in place for legacy HCCS systems.

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## 1. INTRODUCTION

- 1.1. The purpose of the Value Proposition (VP) Evaluation Plan (Evaluation Plan) is to describe the methodology that will be used to evaluate the VP Proposal (Proposal) submitted by the Bidder.
- 1.2. The Proposal will be evaluated as either responsive or not responsive. The Proposal will be deemed responsive if it: i) meets all of the mandatory requirements outlined in Section 2; and, ii) meets the minimum assessment values outlined in Section 3.
- 1.3. All responsive bids will then be evaluated based on rated criteria, as outlined in Section 4.
- 1.4. The results of the evaluation will be conveyed to the Contracting Authority. The results will then be integrated into the overall bid evaluation results, as outlined in section [XX] of the Halifax-Class Combat Systems In-Service Support project's (the Project) evaluation plan.
- 1.5. The Bidder is strongly encouraged to closely review the entire Bidder Instructions document.
- 1.6. Defined terms not otherwise defined in this document have the meaning given to them in the ITB Terms and Conditions and the Request for Proposal, including appendices, to which this Evaluation Plan is attached.

## 2. MANDATORY REQUIREMENTS

- 2.1. The chart below details each mandatory requirement and how the ITB Authority will assess whether it has been met. The Proposal will be assessed as responsive or not responsive. To be considered responsive, all mandatory requirements must be met.

Mandatory Requirement	Method to Confirm
1. Bidder commits to achieving Transactions, measured in Canadian Content Value (CCV), valued at not less than 100 percent of the Contract Value <i>[100 percent or the total CCV of identified Transactions, whichever is higher]</i> , to be achieved within the Achievement Period.	Mandatory requirements certificate is duly signed and submitted.

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2. Bidder commits to achieving not less than 15 percent, of the Contract Value (including options) in Small and Medium Business Transactions, measured in CCV.	Mandatory requirements certificate is duly signed and submitted.
3a. Bidder commits to identifying one (1) year after Contract award, Transactions that are detailed, fully described and bring the cumulative total of identified Transactions to not less than 60 percent of the Contract Value, measured in CCV.	Mandatory requirements certificate is duly signed and submitted.
3b. Bidder commits to identifying three (3) years after Contract award, Transactions that are detailed, fully described and bring the cumulative total of identified Transactions to 100 percent of the Contract Value, measured in CCV	Mandatory requirements certificate is duly signed and submitted.
4. Bidder accepts all of the ITB Terms & Conditions.	Mandatory requirements certificate is duly signed and submitted.
5. Bidder submits all the required components in its Proposal: <ul style="list-style-type: none"> <li>• Company Business Plan</li> <li>• ITB Management Plan</li> <li>• Regional Development Plan</li> <li>• Small and Medium Business Development Plan</li> <li>• Gender and Diversity Plan</li> <li>• Detailed transaction sheets, accompanied by a summary chart of all Transactions.</li> </ul>	Presence of each required component in the Proposal and the Mandatory requirements certificate is duly signed and submitted.
Signed Mandatory requirements Certificate of Compliance	
Table 2-1, Mandatory Requirements Evaluation Chart	

### 3. MINIMUM ASSESSMENT VALUES

3.1. The Plans will be evaluated to determine if they meet the minimum assessment values below.

3.1.1. The Bidder's five Plans (i.e. Company Business Plan, ITB Management Plan, Regional Development Plan, Small and Medium Business Development Plan and Gender and Diversity Plan) will be evaluated to confirm that they are present in the Proposal. The Plans (i.e. Company Business Plan, ITB Management Plan, Regional Development Plan and Small and Medium Business Development Plan) are then assessed for quality and for risk, using the assessments in Tables 3-1 and 3-2.



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- 3.1.2. Quality will be assessed as to whether the Plans respond to the requested components outlined in Section 5 of the Bidder Instructions, the level of detail in the component, and how well the content of the Plan meets the ITB Objectives outlined in Section 3 of the Bidder Instructions.
- 3.1.3. Quality will be assessed on a scale of one (1) to four (4), using the values below in Table 3-1.

VALUE	PLAN – QUALITY ASSESSMENTS
4	<b>SUPERIOR</b> Plan contains detailed responses to four or more of the requested items in Section 5.1 to 5.2, both inclusive, as applicable, of the Bidder Instructions. The Plan demonstrates that many of Canada’s ITB Objectives will be met.
3	<b>GOOD</b> Plan contains detailed responses to three of the requested items in Section 5.4 to 5.7, both inclusive, as applicable, of the Bidder Instructions. The Plan demonstrates that several of Canada’s ITB Objectives will be met.
2	<b>POOR</b> Plan contains detailed responses to two of the requested items in Section 5.4 to 5.7, both inclusive, as applicable, of the Bidder Instructions. The Plan demonstrates that some of Canada’s ITB Objectives will be met.
1	<b>VERY WEAK</b> Plan contains detailed response to one or less of the requested items in the Section 5.4 to 5.7, both inclusive, as applicable, of the Bidder Instructions. The Plan does not demonstrate that Canada’s ITB Objectives will be met.

**Table 3- 1, Plan Quality Assessments**

- 3.1.4. Risk will be assessed as to whether the Plans respond to the risk areas outlined in Section 5 of the Bidder Instructions and the level of detail provided.
- 3.1.5. Risk will be assessed on a scale of one (1) to four (4), using the values below in Table 3-2.

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VALUE	PLAN - RISK ASSESSMENTS
4	<b>SUPERIOR</b> Plan contains a detailed response to four or more of the risk areas in Section 5.1 of the Bidder Instructions, such that the probability of failure to achieve is extremely low.
3	<b>GOOD</b> Plan contains a detailed response to three of the risk areas in Section 5.3 of the Bidder Instructions, such that the probability of failure to achieve is low.
2	<b>POOR</b> Plan contains a detailed response to two of the risk areas in Section 5.3 of the Bidder Instructions, such that the probability of failure to achieve is moderate.
1	<b>VERY WEAK</b> Plan contains a detailed response to one or less of the risk areas in Section 5.3 of the Bidder Instructions, such that the probability of failure to achieve is significant.

**Table 3- 2, Plan Risk Assessments**

3.1.6. The Quality and Risk assessments agreed to by evaluators will be multiplied together and the sums added together to determine the final Plans assessment value for the Proposal.

3.1.7. The Bidder must achieve or exceed a final Plans assessment value of thirty-two (32) (out of a possible sixty-four (64)).

**EXAMPLE:**

Plan	Quality (A)	Risk (B)	Assessment Value (C) (C) = (A) x (B)
Company business Plan	4	3	12
ITB management Plan	2	3	6
Regional development Plan	4	4	16
SMB development Plan	4	2	8
<b>Final plans assessment value</b>			<b>42</b>

**Table 3.3 - Example**

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### 3.2. Evaluation of proposed Transactions

- 3.2.1. The Bidder's proposed Transactions will be evaluated to determine whether they comply with the Bidder Instructions and with the ITB Terms and Conditions, with respect to eligibility criteria, valuation, banking and transaction types.
- 3.2.2. If a proposed Transaction does not meet the criteria outlined in Section 3.2.1, above, it will be rejected and will receive no further consideration during the mandatory or rated evaluation, or in the Contract.
- 3.2.3. If a proposed Transaction meets the criteria outlined in 3.2.1, it will then be evaluated using the rated evaluation criteria outlined in Section 4.

## 4. RATED EVALUATION

- 4.1. The Bidder's proposed Commitments and Transactions will be evaluated against the rated criteria as described below.

- 4.1.1. Management and Emergent Work (80 Points):

*The Bidder may commit to achieve Direct Transactions in the Defence Sector relating to Management Work as described in section 6 of the Bidder Instructions. Points will be awarded as follows:*

Points will be awarded for a Commitment, measured in CCV as a percentage of the Contract Value, to achieve Direct Transactions in the Defence Sector relating to Management Work, as defined in Annex A of the Performance Work Statement. The commitment will be rated as follows:

0.20 points will be awarded per each 1 percent of Commitment, up to a maximum of 20 points.

*The Bidder may commit to achieve Direct Transactions in the Defence Sector relating to the Emergent Work performed in Canada as described in section 6 of the Bidder Instructions. Points will be awarded as follows:*

Points will be awarded for a Commitment, measured in CCV as a percentage of the Contract Value, to achieve Direct Transactions in the

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Defence Sector relating to the Emergent Work performed in Canada, as defined in Annex A of the Performance Work Statement. The commitment will be rated as follows:

- 4.1.1.1. 0 points will be awarded for any Commitments proposed by the bidder between 0 and 5% of the total Contract Value;
- 4.1.1.2. 2 points will be awarded for each 1 percent of Commitment proposed by the bidder between 6 and 15% of the total Contract Value;
- 4.1.1.3. 5 points will be awarded for each 1 percent of Commitment proposed by the bidder between 16 and 20% of the total Contract Value;
- 4.1.1.4. 1 point will be awarded for each 1 percent of Commitment proposed by the bidder between 21 and 25% of the total Contract Value;
- 4.1.1.5. 0 points will be awarded for any commitments proposed by the bidder over and above the rating specified under 4.1.1.4.

Please note that for evaluation purposes only, the above Emergent Work Commitments will be rounded to the nearest whole number.

*The Bidder may identify Direct and Indirect Transactions as described in section 6 of the Bidder Instructions. Points will be awarded as follows:*

Points will be awarded for the Identification of Direct and Indirect Transactions, measured in CCV. The identification of Transactions will be rated as follows:

The Bidder with the highest total dollar value, measured in CCV, in identified Transactions will receive 10 points. All other Bidders will be prorated down.

4.1.2. Research and Development (10 points):

*The Bidder may identify a Commitment to achieve Transactions in Research and Development (R&D) as described in section 6 of the Bidder Instructions. Points will be awarded as follows:*

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Points will be awarded for a Commitment, measured in CCV as a percentage of the Contract Value, to achieve Transactions in Research and Development in Defence and non-Defence sectors as defined in the ITB Terms and Conditions, Article 1.1.30. The commitment will be rated as follows:

- 4.1.2.1. 0 points will be awarded for any Commitments proposed by the bidder between 0 and 2% of the total Contract Value;
- 4.1.2.2. 1.75 points will be awarded for each 1 percent of Commitment proposed by the bidder between 3 and 7% of the total Contract Value;
- 4.1.2.3. 0.417 points will be awarded for each 1 percent of Commitment proposed by the bidder between 8 and 10% of the total Contract Value;
- 4.1.2.4. 0 points will be awarded for any commitments proposed by the bidder over and above the rating specified under 4.1.2.3.

Please note that for evaluation purposes only, the above R&D Commitments will be rounded to the nearest whole number.

4.1.3. Skills Development and Training (10 points):

*The Bidder may identify a Commitment to achieve Transactions in Skills Development and Training as described in section 6 of the Bidder Instructions. Points will be awarded as follows:*

Points will be awarded for a Commitment, measured in CCV as a percentage of the Contract Value, to achieve Skills Development and Training Transactions, relating to marine in-service support, as defined in the ITB Terms and Conditions, Article 1.1.33. The commitment will be rated as follows:

- 4.1.3.1. 0 points will be awarded for any Commitments proposed by the bidder between 0 and 2% of the total Contract Value;
- 4.1.3.2. 1.75 points will be awarded for each 1 percent of Commitment proposed by the bidder between 3 and 7% of the total Contract Value;

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4.1.3.3. 0.417 points will be awarded for each 1 percent of Commitment proposed by the bidder between 8 and 10% of the total Contract Value;

4.1.3.4. 0 points will be awarded for any commitments proposed by the bidder over and above the rating specified under 4.1.3.3.

Please note that for evaluation purposes only, the above SD&T Commitments will be rounded to the nearest whole number.

4.2. Any identified Transactions in Proposal will be assessed to determine whether they align with each of the rated evaluation criteria identified in sections 4.1.1 through 4.1.4. The Bidder should provide a level of detail sufficient to support the claim that the Transaction fits within a given criteria.

4.2.1. Transactions where the Bidder does not demonstrate alignment with the rated evaluation criteria will receive zero points in the rated evaluation, but would be included as a Commitment to be achieved in the Contract.

4.2.2. Transactions where the Bidder demonstrates alignment with the rated evaluation criteria will be scored as outlined below in section 4.4, included as a Commitment to be achieved in the Contract.

4.2.2.1. In the event that the Bidder identifies Commitments or Transactions in its Proposal valued at more than 100 percent of the Contract Value, no additional points will be earned in the rated evaluation, above those outlined in the Evaluation Plan. Additionally in this event, the Obligation values in Article 3.1.1 of the Terms and Conditions would be increased to match the total value of those Transactions.

4.3. One identified Transaction may be aligned with multiple criteria and will be scored as such, up to the maximum total points. All Transactions and Commitments identified in the Proposal will be included as a Commitment and/or Obligation to be achieved in the ensuing Contract.

4.3.1. In the event that the total of the Bidder's Transactions identified in the Proposal aligning with any of the rated VP criteria, expressed as a percentage of Contract Value, is greater than the Bidder's Commitment in the same VP criteria as indicated on the Rated Criteria Certificate, the higher value will be considered as the Bidder's Commitment in the rated

evaluation and be included as an Obligation to be achieved in Article 3 of the ensuing Contract.

Table 4.3 below summarizes the rated evaluation scoring:

<b>Criteria</b>	<b>Available Points</b>	<b>Basis of Evaluation</b>
<b>Defence Sector</b>	<b>80</b>	
Commitment to achieve Direct Transactions in the Defence Sector relating to Management Work	20	Commitment on signed rated criteria certificate.
Commitment to achieve Direct Transactions in the Defence Sector relating to the Emergent Work performed in Canada	50	Commitment on signed rated criteria certificate 0-5% = 0 pts 6-15% = 2 pts for each 1% 16-20% = 5 pts for each 1% 21-25% = 1 pts for each 1% >=26% = 0 pts
Identification of Direct and Indirect Transactions in the Defence Sector	10	Commitment on signed rated criteria certificate.  The Bidder with the highest total dollar value, measured in CCV, in identified transactions will receive 10 points. All other Bidders will be prorated down.  <b>Formula:</b>  (Bidder's total Identification/Highest Bidder's total Identification) *10
<b>Research and Development</b>	<b>10</b>	

Commitment to achieve Research and Development Transactions		Commitment on signed rated criteria certificate 0-2% = 0 pts 3-7% = 1.75 pts for each 1% 8-10% = 0.417 pts for each 1% >=11% = 0 pts
<b>Skills Development and Training</b>	10	
Commitment to achieve Skills, Development and Training Transactions		Commitment on signed rated criteria certificate 0-2% = 0 pts 3-7% = 1.75 pts for each 1% 8-10% = 0.417 pts for each 1% >=11% = 0 pts
<b>Total Points</b>	100	

**Table 4.3 – Transaction Scoring**

4.4. Total VP Score: The Bidder's scores for commitments and identified Transactions will be totaled to reach a Total VP Score, which will then be weighted at 15% percent of the total available score for the Project's overall bid evaluation.

Criteria	Bidder 1 Commitment	Bidder 2 Commitment	Bidder 3 Commitment	Basis of Evaluation
<b>Defence Sector</b>				
Commitment to achieve Direct Transactions in Defence Sector relating to Management Work (Maximum of 20)	100%	50%	65%	Commitment on signed Rated criteria certificate – Appendix B of the Bidder's Instructions
<b>Score (a)</b>	20	10	13	



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<p>Commitment to achieve Direct Transactions in Defence Sector relating to Emergent work in Canada (Maximum of 50)</p> <p>0-5% = 0 pts  6-15% = 2 pts for each 1%  16-20% = 5 pts for each 1%  21-25% = 1 pts for each 1%  &gt;=26% = 0 pts</p>	12	20	23	Commitment on signed Rated criteria certificate – Appendix B of the Bidder's Instructions
<b>Score (b)</b>	14	45	48	
<p>Identification of Direct and Indirect Transactions in the Defence Sector (Maximum of 10)</p>	\$10,000,000	\$15,000,000	\$20,000,000	Commitment on signed Rated criteria certificate – Appendix B of the Bidder's Instructions
<b>Pro-rated Score (c)</b>	5	7.5	10	
<b>Research and Development</b>				
<p>Commitment to achieve Research and Development Transactions (Maximum of 15)</p> <p>0-2% = 0 pts  3-7% = 1.75 pts for each 1%</p>	10%	5%	12%	Commitment on signed Rated criteria certificate – Appendix B of the Bidder's Instructions

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8-10% = 0.417 pts for each 1% >=11% = 0 pts				
<b>Score (d)</b>	10	5.25	10	
<b>Skills Development and Training</b>				
Commitment to achieve Skills Development and Training Transactions (Maximum of 15)  0-2% = 0 pts 3-7% = 1.75 pts for each 1% 8-10% = 0.417 pts for each 1% >=11% = 0 pts	10%	7%	5%	Commitment on signed Rated criteria certificate – Appendix B of the Bidder's Instructions
<b>Score (e)</b>	10	8.75	5.25	
<b>Total Points for Bidder: (Score a+b+c+d+e)</b>	<b>59</b>	<b>76.50</b>	<b>86.25</b>	

**Table 4-2 – Draft Evaluation Scenario**

## **5. PROCESS**

- 5.1. The evaluation is led by the ITB Authority, with participation from representatives of the regional development agencies, and, if required, other subject matter experts.
- 5.2. Evaluation assessments and scoring will be carried out by consensus, wherein the Bidder's Proposal will be read, discussed and each evaluator will agree to a score for each rated element. Consensus on broader issues will be sought, such that evaluators agree on the need for and nature of any clarifying questions or advice sought from outside experts. Where consensus on scoring, issues or other

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questions cannot be reached following discussion, the ISED Evaluation Lead will make the final decision.

- 5.3. The ITB Authority will hold overall responsibility for ensuring that the members of the evaluation team carry out their responsibilities. The ITB Authority will act as the liaison between the evaluation team and outside officials.