

**Addendum 2**

**A. AMENDMENT TO THE BID SOLICITATION**

1. Under Section 1: (ii) Data Sheet, clause Definition (s), 7.3, is amended as follows:

Definition (t), 7.3	The RFSA Closing Date is 25 February 2020 at 14:00 hrs, Eastern Standard Time(EST)
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2. Under Section 2: Tech 4A, *Experience related to the position* title and paragraph as provided below are deleted.

Experience related to the position:	<i>For each work experience related to the position, indicate the number of days providing technical advice on blended finance or related matters working with either International Financial Institutions, Multilateral Development Banks, Multilateral Institutions, Development Finance Institutions, Donor Agencies or other similar organizations; or Financial/Investment institutions, Investment Funds, Banks, Export Credit Agencies or other similar organizations (private or public).</i>
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3. Under Section 2: Tech 4B; to further distinguish between assignments from work experience form TECH-4A is amended as follows:

**FORM TECH- 4B**

**DEMONSTRATION OF PROPOSED INDIVIDUAL’S TECHNICAL CAPABILITIES**

<b><u>Guidance to Bidders:</u></b>	
TECH-4B is limited to two (2) pages per assignment or experience. The information below will be used to evaluate all Rated Technical Criterion.	
<i>Note: The Bidder should clearly demonstrate how the Proposed Individual meets the elements listed in each Rated Technical Criteria, as per the requirements set out in Section 5: Evaluation Criteria.</i>	
<b>Name of Proposed Individual:</b>	
<b>Rated Technical Criteria:</b> [Insert number]	
<b>Assignment or experience:</b> [Insert Title]	
<b>Assignment or experience start date / completion date:</b> (yyyy-mm) – (yyyy-mm)	<b>Technical Advisor Services Level of effort (in Days):</b>
<i>Note to Bidders: If a portion of the Assignment or experience is not within the last 10 years, the level of effort should clearly indicate the number of Days of experience performed within the last</i>	<i>Notes to Bidders: The level of effort should indicate the number of Days worked for the provision of Technical Advisor Services only, as per the requirement set out in section 5: Evaluation Criteria for relevant Rated Technical Criteria, and the Technical Advisor Services’ Definition; and The level of effort should be at</i>

<i>10 years, as per the requirements set out in Section 5: Evaluation Criteria.</i>	<i>least 20 Days, as per the requirement set out in section 5: Evaluation Criteria, Assignment's Definition.</i>
<b>Name of employer:</b>	<b>Position/role of Proposed Individual:</b>
<b>Reference:</b> <i>Name and E-mail Address or Phone number</i>	
<b>Description of the Proposed Individual's roles and responsibilities in the Assignment or experience:</b>	

4. Section 5: Evaluation Criterion R1.3, first paragraph is amended as follows:

Using form TECH-4B, the Bidder should provide 5 Assignment(s), demonstrating the Proposed Individual's experience acquired within 10 years prior to the RFSA closing date, providing technical guidance in support of, or being responsible to perform due diligence activities on blended finance initiatives, including more specifically the assessment of fiduciary risks with a focus on identifying key risks and mitigating factors\*.

5. Under Section 5: Evaluation Criterion R1.4, first paragraph is amended as follows:

Using form TECH-4B, the Bidder should demonstrate that the Proposed Individual has experience acquired within 10 years prior to the RFSA closing date, providing technical advice on blended finance or related matters working with: International Financial Institutions, Multilateral Development Banks, Multilateral Institutions, Development Finance Institutions, Donor Agencies or other similar organizations.

6. Under Section 5: Evaluation Criterion R1.5, first paragraph is amended as follows:

Using form TECH-4B, the Bidder should demonstrate that the Proposed Individual has experience acquired within 10 years prior to the RFSA closing date, providing technical advice on blended finance or related matters working with: Financial or Investment institutions, Investment Funds, Banks, Export Credit Agencies or other similar organizations (private or public).

7. Under Section 5: Evaluation Criterion R2.3, first paragraph is amended as follows:

Using form TECH-4B, the Bidder should provide 5 Assignments demonstrating the Proposed Individual's experience acquired within 10 years prior to the RFSA closing date in either:

8. Under Section 5: Evaluation Criterion R2.4, first paragraph is amended as follows:

Using form TECH-4B, the Bidder should demonstrate that the Proposed Individual has gained experience acquired within 10 years prior to the RFSA closing date, developing Financial Models for investing/lending/funding (e.g., guarantees, loans or repayable contributions, loans or guarantees) or providing technical advice to support their development while working for: International Financial Institutions, Multilateral Development Banks, Multilateral Institutions, Development Finance Institutions, Donor Agencies or other similar organizations, Financial or Investment institutions, Investment Funds, Banks, Export Credit Agencies or other similar organizations (private or public).

- 9. Under Section 5: Evaluation Criterion R3.3, first paragraph is amended as follows:

Using form TECH-4B the Bidder should provide a maximum of 5 Assignment(s) demonstrating the Proposed Individual’s experience acquired within 10 years prior to the RFSA closing date, in providing technical guidance in support of, or being responsible for negotiating funding arrangements or agreements with recipients, ideally in the context of blended finance initiatives, including providing advice based on, or considering international best practices.

- 10. Under Section 5: Evaluation Criterion R3.4, first paragraph is amended as follows:

Using form TECH-4B, the Bidder should demonstrate that the Proposed Individual has experience acquired within 10 years prior to the RFSA closing date, providing technical advice on blended finance or related matters working with: International Financial Institutions, Multilateral Development Banks, Multilateral Institutions, Development Finance Institutions, Donor Agencies or other similar organizations.

- 11. Under Section 5: Evaluation Criterion R3.5, first paragraph is amended as follows:

Using form TECH-4B, the Bidder should demonstrate that the Proposed Individual has experience acquired within 10 years prior to the RFSA closing date, providing technical advice on blended finance or related matters working with: Financial or Investment institutions, Investment Funds, Banks, Export Credit Agencies or other similar organizations (private or public).

**B. QUESTIONS AND ANSWERS**

<b>Question 1</b>	Regarding section 10.2 of the Instructions to Bidders (pages 9 and 10 of the RFSA), do the amounts corresponding to each one of the "cost elements" have to be mentioned in the proposal? (or the cost elements amounts should just be considered by the bidder for determining the proposed daily fee?)
<b>Answer 1</b>	The cost elements are included for consideration in order to help the Bidder determine the proposed all-inclusive daily fee.

<b>Question 2</b>	Do the Proposed Individuals have to be employees or shareholders of the firm submitting the bid? Or can they also be individuals with contractual arrangements with the Bidder?
<b>Answer 2</b>	As per the Definitions in Part 1 – Instructions to Bidders “Proposed Individual” means an individual the Bidder proposes to be qualified through this RFSA for the provision of consulting and professional services in a Sub-Sector. A Proposed Individual can be the Bidder’s employee or an individual contracted by the Bidder.
<b>Question 3</b>	Can some of the Proposed Individuals of a Canadian Bidder be foreign nationals living and working from outside of Canada?
<b>Answer 3</b>	Yes, a Proposed Individual can be a foreign national living and working from outside of Canada.
<b>Question 4</b>	In the case of a selected Bidder that signs a SA with more than one approved Proposed Individual, does the selected Bidder have the right to choose who among the approved Proposed Individuals gets involved in delivering the services for each specific project?
<b>Answer 4</b>	Yes, for all requirements valued at CAD \$200,000 or more (including Applicable Taxes) DFATD will conduct a Solicitation Process and request that SA Holder(s) submit a detailed technical and financial proposal for any Qualified Individual it deems best suited to the requirement.  For requirements valued at less than CAD \$200,000 (including Applicable Taxes) DFATD may also conduct a Solicitation Process or send a Request for Quote (RFQ) to the SA Holder of the first-ranked Qualified Individual it has selected on a Best-fit basis. Reference: "5.3 Solicitation Processes" of PART II: STANDARD FORM OF SUPPLY ARRANGEMENT
<b>Question 5</b>	Regarding section 9 of form TECH-2 after "Complete both A and B" (page 23 of the RFSA), thank you for explaining each question?
<b>Answer 5</b>	This applies to the Federal Contractors Program for Employment Equity. For more information visit the following website from Employment and Social Development Canada (ESDC) – Labour’s website.
<b>Question 6</b>	Regarding form FIN-1 (page 30 of the RFSA), please clarify the daily fee "by year: Y1, Y2, etc."
<b>Answer 6</b>	The Bidder must include the daily fee for each proposed individual on a yearly basis for three years.
<b>Question 7</b>	What is the likely approach for future solicitations released to those qualified under the RFSA – will the RFPs be for engaging individuals separately or requesting a team of individuals to be proposed to meet that specific RFP’s requirements? If more than one resource is being procured to address multiple sub-sectors of expertise for a single project/initiative, will DFATD consider prioritizing seeking multiple members from one organization (if it is qualified in multiple sub-sectors) to best support cohesive project management and delivery?

<b>Answer 7</b>	When undertaking a Solicitation Process, including when the requirement relates to multiple Sub-Sectors, DFATD will send the SA RFP to all SA Holders qualified within the Sub-Sectors and no preference will be given to an organization that proposes Qualified Individuals in multiple Sub-Sectors. Extract from PART II: STANDARD FORM OF SUPPLY ARRANGEMENT: "5.2.2 Where a particular requirement is related to multiple Sub-Sectors, all SA Holders qualified in the related Sub-Sectors will be eligible to participate."
<b>Question 8</b>	Would DFATD consider additional opportunities throughout the year to qualify new individuals on the RFSA for organizations with one or more qualified individuals, beyond the annual refresh noted?
<b>Answer 8</b>	No, DFATD will only evaluate proposals submitted by Bidders or existing SA holders as part of the SA Refresh process described under "4.2 SA Refresh" of PART II: STANDARD FORM OF SUPPLY ARRANGEMENT
<b>Question 9</b>	Can you share an estimation of the total scale of the opportunities expected to be procured through the RFSA on an annual basis (e.g., what is the total amount available to be procured through the vehicle)? Is there an anticipated proportion of RFPs expected to be procured under \$200,000 vs. over \$200,000?
<b>Answer 9</b>	DFATD's annual requirements will fluctuate depending on variables such as: number of supported initiatives, complexity, and seasonal variation of the demand. DFATD cannot provide expectations or anticipate proportions of SAs over or under \$200,000.
<b>Question 10</b>	What is the period of the Supply Arrangement (e.g. how many years must be outlined in the FORM FIN-1 Daily Fees)?
<b>Answer 10</b>	See question and answer to Q-6 above
<b>Question 11</b>	Would DFATD consider allowing a fully electronic bid submission via email of only soft copies, instead of providing hard copies?
<b>Answer 11</b>	As per section 7 – "Submission and Receipt of Proposals" in "Section 1 (i) Instruction to Bidders", electronic transmission of a Proposal to DFATD by any means, including by electronic mail or facsimile will not be accepted.
<b>Question 12</b>	Can DFATD confirm that Bidders may propose the same individual for multiple sub-sectors?
<b>Answer 12</b>	Yes, Bidders may propose the same individual for multiple sub-sectors
<b>Question 13</b>	Is there a limit to the number of SAs DFATD will issue as a result of this process?
<b>Answer 13</b>	No. There is no limit.
<b>Question 14</b>	For how many years should bidders provide daily fees in FORM FIN-1 (Page 30)?
<b>Answer 14</b>	See question and answer to Q-6 above.
<b>Question 15</b>	Will SAs be issued for each proposed individual separately or will a firm have an SA with multiple individuals falling under it?
<b>Answer 15</b>	A firm can have an SA with multiple individuals falling under it, however the SAs will be divided into sub-sectors.

<b>Question 16</b>	Can DFATD elaborate on the differences in TECH-4A and TECH-4B? Is it acceptable that the same assignments are found in both TECH-4A and TECH-4B?
<b>Answer 16</b>	For this RFSA, TECH-4A will be used to evaluate rated criteria: 1.1,1.2, 2.1,2.2, 3.1,3.2. DFATD may also use TECH-4A (Curriculum Vitae for the Proposed individual) to assess Qualified Individuals of SA holders when issuing a contract on the best-fit Basis (5.3.2 of SA – Section 1: General Information) of PART II: STANDARD FORM OF SUPPLY ARRANGEMENT. Assignments submitted using TECH-4B can also be included in TECH-4A, but the Bidder should consider the 10 page limitation in TECH-4A and select the most relevant information to be included in the Curriculum Vitae for the Proposed individual. For this RFSA TECH-4B will rate 1.3-1.5; 2.3-2.4; 3.3-3.5.
<b>Question 17</b>	Can DFATD elaborate on how it is using the term “initiative” on page 43? An example of an assignment that would fall under this category would be helpful.
<b>Answer 17</b>	The term initiative is being used by DFATD to describe a new plan or action to improve something or solve a problem within the context of international development (i.e. Canadian funding for international initiatives <a href="https://www.international.gc.ca/world-monde/funding-finance/index.aspx?lang=eng&amp;_ga=2.183261667.437351572.1578586686-1768366731.1568136397">https://www.international.gc.ca/world-monde/funding-finance/index.aspx?lang=eng&amp;_ga=2.183261667.437351572.1578586686-1768366731.1568136397</a> ). For the purpose of this RFSA the Bidder should propose assignments that demonstrate the Proposed Individual’s experience in relation to specific evaluation criteria.
<b>Question 18</b>	Can DFATD confirm that only TECH-4B, and not TECH-4A, will be used in evaluating the “experience” criteria for each of the three sub-sectors?
<b>Answer 18</b>	This is correct, at the RFSA stage the experience of the Proposed Individuals for each sub sector, will be evaluated using TECH-4B (i.e., rated criteria 1.3-1.5; 2.3-2.4; 3.3-3.5).
<b>Question 19</b>	Page 68, 5.1 says: “The Bidder must hold a valid SA in the Sub-Sector indicated in the SA RFP to be eligible to participate in the Solicitation Process. Where multiple Sub-Sectors are indicated in the SA RFP, the Bidder must hold a valid SA in the Sub-Sectors indicated in order to be eligible.” Can DFATD clarify whether a Bidder must hold a valid SA in each of the Sub-Sectors indicated or just one of the Sub-Sectors indicated in order to be eligible to participate in such a solicitation process?
<b>Answer 19</b>	During the Solicitation Process an SA RFP will be sent to SA Holders that have Qualified Individual(s) in the relevant Sub-Sector(s) for each specific requirement. Some specific requirements may require Qualified Individual(s) in one or multiple Sub-Sector(s).
<b>Question 20</b>	Page 96, 4.1.2 states: “If specified in the Contract, the Consultant is permitted to sub-contract for Ad-hoc resources not listed in the SA. The total value of sub-contracted services is limited to twenty percent (20%) of the total value of the Contract, excluding taxes.” Can DFATD confirm whether ad-hoc resources from

	within a bidder's own organizations are subject to the same limitation of twenty percent (20%) of total value of the Contract, excluding taxes?
<b>Answer 20</b>	Any individual not listed in the SA will fall under this section.
<b>Question 21</b>	The scoring criteria in the RFSA benefits and evaluates only individuals rather than firms / organizations. This disadvantages bidders with built-in team structures who allow for this team-based approach. Can this be taken into account in subsequent SA RFPs and SA Refreshes so that Bidders may provide the best value to DFATD.
<b>Answer 21</b>	We will take this into consideration for future RFSA's but not at this time.
<b>Question 22</b>	Do you know whether specific security requirements are likely to apply to procurements under this SA, and whether we would be able to seek clearance through the Canadian system for solicitations under this SA?
<b>Answer 22</b>	As per Section 4.7, page 61 – Security Requirements in Section 1: General Information, there is no specific security requirement for the purpose of this SA. However, subsequent requirements procured through a solicitation process within the framework of this SA may contain security requirements, although it is unlikely.
<b>Question 23</b>	TECH Forms 4A & 4B provide a requirement for experience within the last 10 years, however; this is not specified anywhere else such as in the evaluation grid. Please explain.
<b>Answer 23</b>	DFATD will only consider the experience of the Proposed individual that has been acquired within the last 10 years. See questions and answers no. Q-16 and Q-18 as well as amendments 4 – 11 above.
<b>Question 24</b>	For initiatives under \$200K, could one include both a technical and financial evaluation and another only financial?
<b>Answer 24</b>	Please see SA Section 1: General Information under section 5. SOLICITATION PROCESSES WITHIN THE FRAMEWORK OF THE SA, Pages 62 and 63 for more information.
<b>Question 25</b>	Is there a maximum number of vendors?
<b>Answer 25</b>	No, there is no maximum number of vendors.
<b>Question 26</b>	Have there been other organizations that have delivered such services to DFATD?
<b>Answer 26</b>	Yes, DFATD has required services for similar types of assignments in the past.
<b>Question 27</b>	Are these projects/initiatives generating revenue? I mean for the purpose of the financial modeling going to appropriations? Or generated from tax payments?
<b>Answer 27</b>	These should not be tax based type initiatives. They are revenues coming from investments and other types of financial instruments.
<b>Question 28</b>	Can the list of participants at the Bidders' Conference be shared?
<b>Answer 28</b>	Bidders have the option to join the List of interested Suppliers (LIS) for this tender under the terms and conditions specified in theBuyandsell.gc.ca site. The list of registered suppliers willing to share their information is publically available in the RFSA's site.

	To join the list of interested suppliers you can follow this link: <a href="https://buyandsell.gc.ca/procurement-data/tenders/get-started/join-a-list-of-interested-suppliers">https://buyandsell.gc.ca/procurement-data/tenders/get-started/join-a-list-of-interested-suppliers</a>
<b>Question 29</b>	Additional clarification is requested on the eligibility of subcontractors: Can an organization use ad-hoc Resources?
<b>Answer 29</b>	Yes. Whoever is not listed in the SA can be a subcontractor.
<b>Question 30</b>	Request clarification on the rated technical criterion R1.4/R1.5 (page 44) and related criteria for the other two sub-sectors: The evaluation criteria refers to demonstrating this on TECH 4B, while the reference for this occurs in TECH 4A (Experience related to the position). Does it need to appear in Tech 4A, TECH 4B or both?  Related to this, are the cumulative days calculated from the 5 assignments for TECH 4B, each assignment individually, or the cumulative assignments presented in TECH 4A.
<b>Answer 30</b>	The Bidders should use form TECH-4B to demonstrate that the Proposed Individual has experience for Rated Technical Criterion R1.4, R1.5, R2.4, R3.4 and R 3.5. For these Rated Technical Criterion the Bidders can submit several TECH-4B forms and points will be awarded based on the cumulative number of days of relevant experience that has been demonstrated.

**C. ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.**