

**THIS REQUIREMENT CONTAINS A SECURITY REQUIREMENT**

**TABLE OF CONTENTS**

<b>PART 1 - GENERAL INFORMATION .....</b>	<b>3</b>
1.1 INTRODUCTION .....	3
1.2 SUMMARY .....	3
1.3 SECURITY REQUIREMENTS .....	3
1.4 DEBRIEFINGS .....	4
1.5 ANTICIPATED MIGRATION TO AN E-PROCUREMENT SOLUTION (EPS).....	4
<b>PART 2 - OFFEROR INSTRUCTIONS .....</b>	<b>4</b>
2.1 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS.....	4
2.2 SUBMISSION OF OFFERS .....	4
2.3 FORMER PUBLIC SERVANT - COMPETITIVE - OFFER .....	4
2.4 ENQUIRIES - REQUEST FOR STANDING OFFERS.....	5
2.5 APPLICABLE LAWS .....	6
<b>PART 3 - OFFER PREPARATION INSTRUCTIONS.....</b>	<b>6</b>
3.1 OFFER PREPARATION INSTRUCTIONS.....	6
<b>PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION .....</b>	<b>7</b>
4.1 EVALUATION PROCEDURES .....	7
4.2 BASIS OF SELECTION .....	8
<b>PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION .....</b>	<b>8</b>
5.1 CERTIFICATIONS REQUIRED WITH THE OFFER.....	8
5.2 CERTIFICATIONS PRECEDENT TO THE ISSUANCE OF A STANDING OFFER AND ADDITIONAL INFORMATION.....	8
<b>PART 6 - SECURITY, FINANCIAL AND INSURANCE REQUIREMENTS .....</b>	<b>9</b>
6.1 SECURITY REQUIREMENTS .....	9
<b>PART 7 - STANDING OFFER AND RESULTING CONTRACT CLAUSES .....</b>	<b>9</b>
<b>A. STANDING OFFER .....</b>	<b>9</b>
7.1 OFFER .....	9
7.2 SECURITY REQUIREMENTS .....	10
7.3 STANDARD CLAUSES AND CONDITIONS .....	10
7.4 TERM OF STANDING OFFER.....	11
7.5 AUTHORITIES .....	11
7.6 PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS .....	11
7.7 IDENTIFIED USERS .....	12
7.8 CALL-UP INSTRUMENT .....	12
7.9 LIMITATION OF CALL-UPS.....	12
7.10 PRIORITY OF DOCUMENTS.....	12
7.11 CERTIFICATIONS AND ADDITIONAL INFORMATION .....	12
7.12 APPLICABLE LAWS .....	13
7.13 TRANSITION TO AN E-PROCUREMENT SOLUTION (EPS).....	13
<b>B. RESULTING CONTRACT CLAUSES .....</b>	<b>13</b>
7.1 STATEMENT OF WORK.....	13
7.2 STANDARD CLAUSES AND CONDITIONS .....	13
7.3 TERM OF CONTRACT .....	13
7.4 PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS .....	13
7.5 PAYMENT .....	13
7.6 INVOICING INSTRUCTIONS .....	14
7.7 INSURANCE .....	14
7.8 SACC MANUAL CLAUSES .....	15
<b>ANNEX "A" .....</b>	<b>16</b>
STATEMENT OF WORK .....	16
<b>ANNEX "B" .....</b>	<b>21</b>
BASIS OF PAYMENT .....	21
BASIS OF PAYMENT 1: CATEGORY #1 – BIOTECHNOLOGIES .....	23
BASIS OF PAYMENT 2: CATEGORY #2 – PLANT VARIETY PROTECTION .....	25
BASIS OF PAYMENT 3: CATEGORY #3 –PRODUCTS & EQUIPMENT .....	27
BASIS OF PAYMENT 4: CATEGORY #4 – NEW TRENDS .....	29
<b>ANNEX "C" .....</b>	<b>31</b>
SECURITY REQUIREMENTS CHECK LIST .....	31

---

<b>ANNEX "D"</b> .....	<b>34</b>
INSTRUCTIONS FOR ANNEXES "E" THROUGH "F" .....	34
<b>ANNEX "E"</b> .....	<b>36</b>
MANDATORY TECHNICAL CRITERIA FOR OFFEROR FOR ALL CATEGORIES .....	36
<b>ANNEX "F"</b> .....	<b>37</b>
MANDATORY TECHNICAL CRITERIA FOR CATEGORY 1 - BIOTECHNOLOGIES .....	37
<b>ANNEX "G"</b> .....	<b>43</b>
MANDATORY TECHNICAL CRITERIA FOR CATEGORY #2 – PLANT VARIETY PROTECTION .....	43
<b>ANNEX "H"</b> .....	<b>47</b>
MANDATORY TECHNICAL CRITERIA FOR CATEGORY #3 – PRODUCTS AND EQUIPMENT .....	47
<b>ANNEX "I"</b> .....	<b>53</b>
MANDATORY TECHNICAL CRITERIA FOR CATEGORY #4 – NEW TRENDS .....	53
<b>ANNEX "J" TO PART 3 OF THE REQUEST FOR STANDING OFFERS</b> .....	<b>60</b>
ELECTRONIC PAYMENT INSTRUMENTS .....	60
<b>ANNEX "K"</b> .....	<b>61</b>
STANDING OFFER USAGE REPORT .....	61

## **PART 1 - GENERAL INFORMATION**

### **1.1 Introduction**

The Request for Standing Offers (RFSO) is divided into seven parts plus attachments and annexes, as follows:

- |        |   |
|--------|---|
| Part 1 | General Information: provides a general description of the requirement;   |
| Part 2 | Offeror Instructions: provides the instructions applicable to the clauses and conditions of the RFSO;   |
| Part 3 | Offer Preparation Instructions: provides offerors with instructions on how to prepare their offer to address the evaluation criteria specified;   |
| Part 4 | Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria which must be addressed in the offer, and the basis of selection;   |
| Part 5 | Certifications and Additional Information: includes the certifications and additional information to be provided;   |
| Part 6 | Security, Financial and Insurance Requirements: includes specific requirements that must be addressed by offerors; and  |
| Part 7 | 7A, Standing Offer, and 7B, Resulting Contract Clauses:<br><br>7A, includes the Standing Offer containing the offer from the Offeror and the applicable clauses and conditions;<br><br>7B, includes the clauses and conditions which will apply to any contract resulting from a call-up made pursuant to the Standing Offer. |

The Annexes include the Statement of Work, the Basis of Payment, the Electronic Payment Instruments, the Federal Contractors Program for Employment Equity - Certification and any other annexes

### **1.2 Summary**

Agriculture and Agri-Food Canada (AAFC) has a requirement for one (1) Senior Patent Agent (SPA), Junior Patent Agent (JPA) and Clerical Assistant to provide patent services, on the Offeror's premises, related to the protection of IP in each of the following patent categories:

1. Biotechnologies
2. Plant Variety Protection
3. Products and Equipment and
4. New Trends

Services required are for a number of AAFC Commercialization Officers Science and Technology Branch's Office of Intellectual Property and Commercialization at various office locations across Canada identified as authorized users in Annex "A" Statement of Work.

Patent filings will be primarily made in the United States of America and Canada. Patents may be filed in both Patent Cooperation Treaty (PCT) countries and non-PCT countries.

It is Canada's intent to issue up to four (4) standing offers for the four (4) categories listed herein. A supplier may be issued a standing offer for more than one category.

Each regional individual standing offer is for a period of two years, with the option to extend each standing offer for up to three (3) periods of one (1) year each.

The requirement is subject to a preference for Canadian services.

This RFSO allows offerors to use the epost Connect service provided by Canada Post Corporation to transmit their offers electronically. Offerors must refer to Part 2 of the RFSO entitled Offeror Instructions and Part 3 of the RFSO entitled Offer Preparation Instructions, for further information on using this method.

### **1.3 Security Requirements**

There are security requirements associated with the requirement of the Standing Offer. For additional information, see Part 6 - Security, Financial and Insurance Requirements, and Part 7 - Standing Offer and

Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, offerors should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

#### 1.4 Debriefings

Offerors may request a debriefing on the results of the request for standing offers process. Offerors should make the request to the Standing Offer Authority within 15 working days of receipt of the results of the request for standing offers process. The debriefing may be in writing, by telephone or in person.

#### 1.5 Anticipated migration to an e-Procurement Solution (EPS)

Canada is currently developing an online EPS for faster and more convenient ordering of goods and services. In support of the anticipated transition to this system and how it may impact any resulting Standing Offer that is issued under this solicitation, refer to 7.15 Transition to an e-Procurement Solution (EPS).

The Government of Canada's [press release](#) provides additional information.

### PART 2 - OFFEROR INSTRUCTIONS

#### 2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the Request for Standing Offers (RFSO) 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.

Offerors who submit an offer agree to be bound by the instructions, clauses and conditions of the RFSO and accept the clauses and conditions of the Standing Offer and resulting contract(s).

The [2006](#) (2019-03-04), Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the RFSO.

Subsection 5.4 of [2006](#), Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days  
Insert: 120 days

#### 2.2 Submission of Offers

Offers must be submitted only to the Public Works and Government Services Canada (PWGSC) Bid Receiving Unit specified below by the date and time indicated on page 1 of the RFSO:

##### PWGSC Western Region Bid Receiving Unit

Only offers submitted using epost Connect service will be accepted. The Offeror must send an email requesting to open an epost Connect conversation to the following address: [roreceptionSoumissions.wrbridreceiving@tpsgc-pwgsc.gc.ca](mailto:roreceptionSoumissions.wrbridreceiving@tpsgc-pwgsc.gc.ca)

**Note:** Offers will not be accepted if emailed directly to this email address. This email address is to be used to open an epost Connect conversation, as detailed in Standard Instruction [2006](#), or to send offers through an epost Connect message if the Offeror is using its own licensing agreement for epost Connect.

It is the Offeror's responsibility to ensure the request for opening an epost Connect conversation is sent to the email address above at least six days before the Request for Standing Offers closing date.

Transmission of offers by facsimile or hardcopy to PWGSC will not be accepted.

#### 2.3 Former Public Servant - Competitive - Offer

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPS, offerors must provide the information required below before the issuance of a standing offer. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of offers is completed, Canada will inform the Offeror 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 offer non-responsive.

#### Definitions

For the purposes of this clause,

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

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

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

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

#### Former Public Servant in Receipt of a Pension

**As per the above definitions, is the Offeror a FPS in receipt of a pension?**

YES ( ) NO ( )

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

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

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

#### Work Force Adjustment Directive

**Is the Offeror a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive?**

YES ( ) NO ( )

If so, the Offeror must provide the following information:

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

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

#### 2.4 Enquiries - Request for Standing Offers

All enquiries must be submitted in writing to the Standing Offer Authority no later than 10 calendar days before the Request for Standing Offers (RFSO) closing date. Enquiries received after that time may not be answered.

Offerors should reference as accurately as possible the numbered item of the RFSO to which the enquiry relates. Care should be taken by offerors 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 offerors do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered to all offerors. Enquiries not submitted in a form that can be distributed to all offerors may not be answered by Canada.

## 2.5 Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in Manitoba.

Offerors may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their offer, 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 offerors.

## 2.6 Bid Challenge and Recourse Mechanisms

- (a) Several mechanisms are available to potential offerors to challenge aspects of the procurement process up to and including contract award.
- (b) Canada encourages offerors to first bring their concerns to the attention of the Contracting Authority. Canada's [Buy and Sell](#) website, under the heading "[Bid Challenge and Recourse Mechanisms](#)" contains information on potential complaint bodies such as:
  - Office of the Procurement Ombudsman (OPO)
  - Canadian International Trade Tribunal (CITT)
- (c) Offerors should note that there are **strict deadlines** for filing complaints, and the time periods vary depending on the complaint body in question. Offerors should therefore act quickly when they want to challenge any aspect of the procurement process.

## 2.7 Basis for Canada's Ownership of Intellectual Property

Agriculture and Agri-Food Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, for the following reasons, as set out in the [Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts](#): the Intellectual Property in Foreground Information consists of material subject to copyright, with the exception of computer software and all documentation pertaining to that software.

## PART 3 - OFFER PREPARATION INSTRUCTIONS

### 3.1 Offer Preparation Instructions

The Offeror must submit its offer electronically in accordance with section 08 of the 2006 standard instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation. The offer must be gathered per section and separated as follows:

Section I: Technical Offer  
Section II: Financial Offer  
Section III: Certifications  
Section IV: Additional Information

Offers transmitted by facsimile or hardcopy will not be accepted.

#### Section I: Technical Offer

In their technical offer, offerors should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

#### Section II: Financial Offer

Offerors must submit their financial offer in accordance with the Annex B, Basis of Payment.

### 3.1.1 Electronic Payment of Invoices - Offer

**If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Annex "J" Electronic Payment Instruments, to identify which ones are accepted.**

If Annex "J" Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices.

Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

### 3.1.2 Exchange Rate Fluctuation

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

**Section III: Certifications** Offerors must submit the certifications and additional information required under Part 5.

### Section IV: Additional Information

#### 3.1.1 Offeror's Proposed Sites or Premises Requiring Safeguarding Measures

- 3.1.1.1 As indicated in Part 6 under Security Requirements, the Offeror must provide the full addresses of the Offeror's and proposed individuals' sites or premises for which safeguarding measures are required for Work Performance:

**Please fill in the blank(s) below:**

Street Number / Street Name, Unit / Suite / Apartment Number:

\_\_\_\_\_

City, Province, Territory / State: \_\_\_\_\_

Postal Code / Zip Code: \_\_\_\_\_

Country: \_\_\_\_\_

- 3.1.1.2 The Company Security Officer must ensure through the Contract Security Program that the Offeror and proposed individual(s) hold a valid security clearance at the required level, as indicated in Part 6 – Security, Financial and Other Requirements.

## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

- (a) Offers will be assessed in accordance with the entire requirement of the Request for Standing Offers including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the offers.
- (c) The evaluation team will determine if there are two or more offers with a valid Canadian Content certification with the offers coming from two or more Offerors that are not affiliated within the meaning used in the Competition Act, R.S.C., 1985, c. C-34. In that event, only those offers with a valid certification will be eligible to be awarded a contract; otherwise, all offers will be eligible. If at any point in the evaluation process it is found, whether by determination of invalidity of certifications, determination that offers are non-responsive or withdrawal of offers by Offerors, that there are no longer two (2) or more responsive offers with a valid certification, then all responsive offers will be eligible to be awarded a contract. Canada may conduct the validation of Canadian content certifications at any time in the evaluation process including doing so concurrently with other steps.

#### 4.1.1 Technical Evaluation

##### 4.1.1.1 Mandatory Technical Criteria

The technical evaluation will be conducted by Category.



Refer to Annexes E through F.

#### 4.1.2 Financial Evaluation

##### 4.1.2.1 Financial Evaluation Criteria

The financial evaluation will be done by Category.

SACC Manual Clause [M0222T](#) (2016-01-28), Evaluation of Price - Canadian/Foreign Offerors

#### 4.2 Basis of Selection

##### 4.2.1 Basis of Selection - Mandatory Technical Criteria Only

An offer must comply with the requirements of the Request for Standing Offers and meet all mandatory technical evaluation criteria to be declared responsive. The responsive offer with the lowest evaluated price in each category will be recommended for issuance of a standing offer.

### PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Offerors must provide the required certifications and additional information to be issued a standing offer.

The certifications provided by offerors to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare an offer non-responsive, will have the right to set-aside a standing offer, or will declare a contractor in default if any certification made by the Offeror is found to be untrue whether made knowingly or unknowingly during the offer evaluation period, during the Standing Offer period, or during the contract period.

The Standing Offer Authority will have the right to ask for additional information to verify the Offeror's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Standing Offer Authority will render the offer non-responsive, result in the setting aside of the Standing Offer or constitute a default under the Contract.

#### 5.1 Certifications Required with the Offer

Offerors must submit the following duly completed certifications as part of their offer.

##### 5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all offerors must provide with their offer, **if applicable**, the declaration form available on the [Forms for the Integrity Regime](#) website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

##### 5.1.2 Additional Certifications Required with the Offer

###### 5.1.2.1 Canadian Content Certification

This procurement is conditionally limited to Canadian services.

Subject to the evaluation procedures contained in the request for standing offer, offerors acknowledge that only offers with a certification that the service offered is a Canadian service, as defined in clause [A3050T](#), may be considered.

Failure to provide this certification completed with the offer will result in the service offered being treated as a non-Canadian service.

**The Offeror certifies that:**

**( ) the service offered is a Canadian service as defined in paragraph 2 of clause [A3050T](#).**

5.1.2.1.1 SACC Manual clause [A3050T](#) (2020-07-01), Canadian Content Definition

#### 5.2 Certifications Precedent to the Issuance of a Standing Offer and Additional Information

The certifications and additional information listed below should be submitted with the offer, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Standing Offer Authority will inform the Offeror 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 provided will render the offer non-responsive.

### 5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real property agreement of 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 Offeror must provide the required documentation, as applicable, to be given further consideration in the procurement process.

### 5.2.2 Federal Contractors Program for Employment Equity - Standing Offer Certification

By submitting an offer, the Offeror certifies that the Offeror, and any of the Offeror's members if the Offeror is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list ) available at the bottom of the page of the [Employment and Social Development Canada-Labour's](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#s4) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#s4>).

Canada will have the right to declare an offer non-responsive, or to set-aside a Standing Offer, if the Offeror, or any member of the Offeror if the Offeror is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of issuing of a Standing Offer or during the period of the Standing Offer.

### 5.2.3 Additional Certifications Precedent to Issuance of a Standing Offer

#### 5.2.3.1 Status and Availability of Resources

[M3020T](#) (2016-01-28), Status of Availability of Resources – Offer

#### 5.2.3.2 Education and Experience

[M3021T](#) (2012-07-16) Education and Experience

## PART 6 - SECURITY, FINANCIAL AND INSURANCE REQUIREMENTS

### 6.1 Security Requirements

1. Before issuance of a standing offer, the following conditions must be met:
  - (a) the Offeror must hold a valid organization security clearance as indicated in Part 7A - Standing Offer;
  - (b) the Offeror's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 7A - Standing Offer;
  - (c) the Offeror must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
  - (d) the Offeror's proposed location of work performance and document safeguarding must meet the security requirements as indicated in Part 7A - Standing Offer;
  - (e) the Offeror must provide the addresses of proposed sites or premises of work performance and document safeguarding as indicated in Part 3 - Section IV Additional Information.
2. Offerors are reminded to obtain the required security clearance promptly. Any delay in the issuance of a standing offer to allow the successful Offeror to obtain the required clearance will be at the entire discretion of the Standing Offer Authority.
3. For additional information on security requirements, offerors should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

## PART 7 - STANDING OFFER AND RESULTING CONTRACT CLAUSES

### A. STANDING OFFER

#### 7.1 Offer

- 7.1.1 The Offeror offers to perform the Work in accordance with the Statement of Work at Annex "A".

## 7.2 Security Requirements

7.2.1 The following security requirements (SRCL and related clauses provided by the Contract Security Program) apply and form part of the Standing Offer.

### SECURITY REQUIREMENT FOR CANADIAN SUPPLIER: PWGSC FILE No. 01R11-20-S009

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

### 7.2.2 Offoror's Sites or Premises Requiring Safeguarding

7.2.2.1 Where safeguarding measures are required in the performance of the Work, the Offoror must diligently maintain up-to-date the information related to the Offoror's and proposed individuals' sites or premises for the following addresses:

***[to be inserted at standing offer issuance]***

Street Number / Street Name, Unit / Suite / Apartment Number  
City, Province, Territory / State  
Postal Code / Zip Code  
Country

7.2.2.2 The Company Security Officer must ensure through the [Contract Security Program](#) that the Offoror and individual(s) hold a valid security clearance at the required level.

## 7.3 Standard Clauses and Conditions

All clauses and conditions identified in the Standing Offer and resulting contract(s) 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.

### 7.3.1 General Conditions

[2005](#) (2017-06-21) General Conditions - Standing Offers - Goods or Services, apply to and form part of the Standing Offer.

### 7.3.2 Standing Offers Reporting

The Offoror must compile and maintain records on its provision of goods and services to Canada under contracts resulting from the Standing Offer. This data must include all purchases done by Canada, including those acquired and paid for by Canada acquisition cards.

The Offoror must provide this data in accordance with the reporting requirements detailed in annex entitled "Standing Offer Usage Report". If some data is not available, the reason must be indicated in the report. If no goods or services is provided during a given period, the Offoror must provide a "nil" report.

The data must be submitted on a quarterly to the Standing Offer Authority.

The quarterly reporting periods are defined as follows:

- first quarter: October 1 to December 31
- second quarter: January 1 to March 31

- third quarter: April 1 to June 30
- fourth quarter: July 1 to September 30

The data must be submitted to the Standing Offer Authority no later than 15 calendar days after the end of the reporting period.

#### **7.4 Term of Standing Offer**

##### **7.4.1 Period of the Standing Offer**

The period for making call-ups against the Standing Offer is from approximately October 1, 2020 to September 30, 2022.

##### **7.4.2 Extension of Standing Offer**

If the Standing Offer is authorized for use beyond the initial period, the Offeror offers to extend its offer for three (3) additional one (1) year periods, from October 1, 2022 to September 30, 2023, **from** October 1, 2023 to September 30, 2024 and from October 1, 2024 to September 30, 2025 under the same conditions and at the rates or prices specified in the Standing Offer, or at the rates or prices calculated in accordance with the formula specified in the Standing Offer.

#### **7.5 Authorities**

##### **7.5.1 Standing Offer Authority**

The Standing Offer Authority is:

Name: Karen Chubey  
Title: Procurement Specialist  
Public Works and Government Services Canada  
Acquisitions Branch  
Directorate: Western Region  
Address: 310-269 Main Street  
Winnipeg, Manitoba R3C 1B3

Telephone: 204-291-5928  
E-mail address: [karen.chubey@tpsgc-pwgsc.gc.ca](mailto:karen.chubey@tpsgc-pwgsc.gc.ca)

The Standing Offer Authority is responsible for the establishment of the Standing Offer, its administration and its revision, if applicable. Upon the making of a call-up, as Contracting Authority, he is responsible for any contractual issues relating to individual call-ups made against the Standing Offer by any Identified User.

##### **7.5.2 Project Authority**

The Project Authority for the Standing Offer is identified in the call-up against the Standing Offer.

The Project Authority is the representative of the department or agency for whom the Work will be carried out pursuant to a call-up against the Standing Offer and is responsible for all the technical content of the Work under the resulting Contract.

##### **7.5.3 Offeror's Representative**

**Please fill in the below section:**

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Facsimile: \_\_\_\_\_

E-mail address: \_\_\_\_\_

#### **7.6 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.

## 7.7 Identified Users

The Identified User authorized to make call-ups against the Standing Offer are offices across Canada's Agriculture and Agri-Food Canada Science and Technology Branch Office of Intellectual Property identified in Annex A.

## 7.8 Call-up Instrument

The Work will be authorized or confirmed by the Identified User(s) using the duly completed forms or their equivalents as identified in paragraphs 2 and 3 below, or by using Canada acquisition cards (Visa or MasterCard) for low dollar value requirements.

1. Call-ups must be made by Identified Users' authorized representatives under the Standing Offer and must be for goods or services or combination of goods and services included in the Standing Offer at the prices and in accordance with the terms and conditions specified in the Standing Offer.
2. Any of the following forms could be used which are available through [PWGSC Forms Catalogue](#) website:
  - PWGSC-TPSGC 942 Call-up Against a Standing Offer
  - PWGSC-TPGSC 942-2 Call-up Against a Standing Offer - Multiple Delivery
  - PWGSC-TPSGC 944 Call-up Against Multiple Standing Offers (English version)
  - PWGSC-TPSGC 945 Commande subséquente à plusieurs offres à commandes (French version)

or

3. An equivalent form or electronic call-up document which contains at a minimum the following information:
  - standing offer number;
  - statement that incorporates the terms and conditions of the Standing Offer;
  - description and unit price for each line item;
  - total value of the call-up;
  - point of delivery;
  - confirmation that funds are available under section 32 of the Financial Administration Act;
  - confirmation that the user is an Identified User under the Standing Offer with authority to enter into a contract.

## 7.9 Limitation of Call-ups

Individual call-ups against the Standing Offer must not exceed \$100,000 (Applicable Taxes included).

## 7.10 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 call up against the Standing Offer, including any annexes;
- b. the articles of the Standing Offer;
- c. the general conditions [2005](#) (2017-06-21), General Conditions - Standing Offers - Goods or Services;
- d. the general conditions [2035](#) (2018-06-21), General Conditions - General Conditions - Higher Complexity – Services;
- e. Annex A, Statement of Work;
- f. Annex B, Basis of Payment;
- g. Annex C, Security Requirements Check List;
- h. Annexes E-F Mandatory Technical Criteria
- i. Annex K, Standing Offer Usage Report;
- j. the Offeror's offer dated **[to be inserted at standing offer issuance]**.

## 7.11 Certifications and Additional Information

### 7.11.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Offeror with its offer or precedent to issuance of the Standing Offer (SO), and the ongoing cooperation in providing additional information are conditions of issuance of the SO and failure to comply will constitute the Offeror in default. Certifications are subject to verification by Canada during the entire period of the SO and of any resulting contract that would continue beyond the period of the SO.

## 7.11.2 SACC Manual Clauses

[M3020C](#) (2016-01-28), Status of Availability of Resources - Standing Offer

[M3060C](#) (2008-05-12), Canadian Content Certification

## 7.12 Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in Manitoba..

## 7.13 Transition to an e-Procurement Solution (EPS)

During the period of the Standing Offer, Canada may transition to an EPS for more efficient processing and management of individual call-ups for any or all of the SO's applicable goods and services. Canada reserves the right, at its sole discretion, to make the use of the new e-procurement solution mandatory.

Canada agrees to provide the Offeror with at least a three-month notice to allow for any measures necessary for the integration of the Offer into the EPS. The notice will include a detailed information package indicating the requirements, as well as any applicable guidance and support.

If the Offeror chooses not to offer their goods or services through the e-procurement solution, the Standing Offer may be set aside by Canada.

## B. RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from a call-up against the Standing Offer.

### 7.1 Statement of Work

The Contractor must perform the Work described in the call-up against the Standing Offer.

### 7.2 Standard Clauses and Conditions

#### 7.2.1 General Conditions

[2035](#) (2018-06-21), General Conditions - General Conditions - Higher Complexity – Services apply to and form part of the Contract.

Section 17 Interest on Overdue Accounts, of [2035](#) (2018-06-21), General Conditions - General Conditions - Higher Complexity – Services apply to and form part of the Contract will not apply to payments made by credit cards.

#### 7.2.2 Supplemental General Conditions

[4007](#) (2010-08-16), Canada to Own Intellectual Property Rights in Foreground Information, apply to and form part of the Contract.

### 7.3 Term of Contract

#### 7.3.1 Delivery Date

Delivery must be completed in accordance with the call-up against the Standing Offer.

### 7.4 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.

### 7.5 Payment

#### 7.5.1 Basis of Payment - Firm Hourly Rates

The Contractor will be paid firm hourly rates for work performed in accordance with the Contract (per Annex "B" Basis of Payment). Customs duties are included and Applicable Taxes are extra.

#### Other Direct Expenses

The Contractor will be reimbursed for the direct expenses reasonably and properly incurred in the performance of the Work. These expenses will be paid at actual cost without mark-up, upon submission of an itemized statement supported by receipt vouchers.

#### Option to Extend the Contract

During the extended period of the Contract, the Contractor will be paid per Annex "B" Basis of Payment to perform all the Work in relation to the contract extension.

##### 7.5.1.1 Basis of payment: Fixed time rate – Ceiling price

The Contractor will be paid for the Work performed in accordance with the Basis of Payment at Annex "B", to a ceiling price of \$ **[to be inserted at award]**. Customs duties are included and Applicable Taxes are extra.

##### 7.5.2 Monthly Payment

H1008C (2008-05-12), Monthly Payment

##### 7.5.3 SACC Manual Clauses

A9117C (2007-11-30), T1204 - Direct Request by Customer Department

C2000C (2007-11-30), Taxes - Foreign-based Contractor

C0711C (2008-05-12), Time Verification

##### 7.5.4 Electronic Payment of Invoices – Call-up

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

**[to be inserted at standing offer issuance]**

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);

#### 7.6 Invoicing Instructions

1. The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.
2. Invoices must be distributed as follows:
  - a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

#### ADDITIONAL INFORMATION

All invoices must be sent via email to the designated File Manager, with copies to the Patent Portfolio Manager, Office of Intellectual Property and Commercialization and the Commercialization Assistant.

All Invoices must contain the following information:

- Call up Against Standing Offer #
- Hourly rate and number of Hours charged
- Administration and Official Fees
- Application Number
- Title of technology
- Jurisdiction
- AAFC reference number
- Agent reference number
- First named inventor
- A brief description of all activities undertaken by country

Receipts for all Official Fees paid on the Crown's behalf are required for reimbursement. Invoices MUST BE issued at the end of each month in which services are delivered.

##### 7.7 Insurance

SACC Manual clause G1005C (2016-01-28), Insurance – No Specific Requirement

---

## 7.8 **SACC Manual Clauses**

A7017C (2008-05-12), Replacement of Specific Individuals

## 7.9 **Dispute Resolution**

- (a) The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.
- (b) The parties agree to consult and co-operate with each other in the furtherance of the contract and promptly notify the other party or parties and attempt to resolve problems or differences that may arise.
- (c) If the parties cannot resolve a dispute through consultation and cooperation, the parties agree to consult a neutral third party offering alternative dispute resolution services to attempt to address the dispute.
- (d) Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "Dispute Resolution".



## ANNEX "A"

### STATEMENT OF WORK

#### Patent Agent Services

Agriculture and Agri-Food Canada (AAFC) Science and Technology Branch's Office of Intellectual Property and Commercialization has a requirement for a Senior Patent Agent (SPA), a Junior Patent Agent (JPA) and a Clerical Assistant to provide services in each of the following patent categories, on the Offeror's premises, related to the protection of IP in each which are described in the scope of work:

Category	Description	Resource Required
1	Biotechnologies	Senior Patent Agent
		Junior Patent Agent
		Clerical Assistant
2	Plant Variety Protection	Senior Patent Agent
		Junior Patent Agent
		Clerical Assistant
3	Products and Equipment	Senior Patent Agent
		Junior Patent Agent
		Clerical Assistant
4	New Trends	Senior Patent Agent
		Junior Patent Agent
		Clerical Assistant

Services required are for a number of AAFC Commercialization Officers Science and Technology Branch's Office of Intellectual Property and Commercialization at various office locations across Canada identified as authorized users in the table below.

Patent filings will be primarily made in the United States of America and Canada. Patents may be filed in both Patent Cooperation Treaty (PCT) countries and non-PCT countries.

It is Canada's intent to issue up to four (4) standing offers for the four (4) categories listed herein. A supplier may be issued a standing offer for more than one category.

Each regional individual standing offer is for a period of two years October 1, 2020 to September 30, 2022, with the option to extend each standing offer for up to three (3) periods of one (1) year each.

#### Authorized SO Users:

AAFC Office Location	Province	Address	Postal Code
Summerland Research and Development Centre	British Columbia	4200 HIGHWAY 97 PO BOX 5000 SUMMERLAND BC	V0H 1Z0
Winnipeg Office	Manitoba	Cdn Grain Commission Bldg. Floor 5 303 MAIN STREET, UNIT 500 Winnipeg MB	R3C 3G7
Lacombe Research and Development Centre	Alberta	6000 C & E Trail LACOMBE AB	T4L 1W1
Lethbridge Research and Development Centre		5403 1ST AVENUE SOUTH PO BOX 3000 LETHBRIDGE AB	T1J 4B1

AAFC Office Location	Province	Address	Postal Code
Saskatoon Research and Development Centre	Saskatchewan	Floor SSW 1 107 Science Place Saskatoon SK	S7N 0X2
Swift Current Research and Development Centre		1 AIRPORT ROAD PO BOX 1030 Swift Current SK	S9H 3X2
Ottawa Research and Development Centre	Ontario	K.W. Neatby Building Floor 1, Room 1058 960 CARLING AVENUE OTTAWA ON	K1A 0C6
Guelph Research and Development Centre		174 STONE ROAD WEST GUELPH ON	N1G 4S9
London Research and Development Centre		1391 SANDFORD STREET LONDON ON	N5V 4T3
Harrow Research and Development Centre		2585 COUNTY ROAD 20 HARROW ON	N0R 1G0
Saint-Hyacinthe Research and Development Centre	Quebec	Floor 1, 3600 CASAVANT BOULEVARD WEST SAINT-HYACINTHE QC	J2S 8E3
Saint-Jean-sur-Richelieu Research and Development Centre		430 GOUIN BOULEVARD Saint Jean sur Richelieu QC	J3B 3E6
Sherbrooke Research and Development Centre		2000 COLLEGE STREET Sherbrooke QC	J1M 0C8
Québec Research and Development Centre		2560 HOCHELAGA BOULEVARD Quebec QC	G1V 2J3
Fredericton Research and Development Centre	New Brunswick	Floor 2, Room L205 850 LINCOLN ROAD PO BOX 20280 Fredericton NB	E3B 4Z7
Charlottetown Research and Development Centre	PEI	Floor 3, Room 338 440 UNIVERSITY AVENUE Charlottetown PE	C1A 4N6
Kentville Research and Development Centre	Nova Scotia	32 MAIN STREET KENTVILLE NS	B4N 1J5

#### BACKGROUND:

Scientists within Agriculture and Agri-Food Canada (AAFC) often discover novel and useful innovations that require a commercial partner to bring the technology to market. In order to stimulate business investment in innovation and meet the needs of Canadians with products and/or services, the commercial entity may require a competitive advantage, which in some situations is best attained through a patent.

The number of patent filings are based upon the number of new invention disclosures received and the Government's Science and Technology Strategy encourages Government to work with Small to Medium Entities and other entities to enhance innovation in Canada.

AAFC files provisional patents and trademarks on approximately 11 to 15 new inventions per year, conducts patentability assessments (5 to 7) and freedom to operate assessments (1-2) and also undertakes other actions related to Intellectual Property (IP) protection strategies. AAFC also pursues approximately 20-26 national and formal patent filings.

The development and protection of IP is done on a case by case basis and because AAFC Scientists will always discover new inventions, AAFC will continue to protect them through patents.

For a given invention, a Commercialization Officer at AAFC will be assigned for its management (the "File Manager"). The overall management of the patent and trademark portfolio at AAFC is under the responsibility of the Patent Portfolio Manager, Office of Intellectual Property and Commercialization.

#### SCOPE OF WORK:

1. Biotechnologies:
  - a. Molecular Technologies  
This category includes inventions using genetic techniques to modify or synthetically create nucleic acids and proteins in eukaryotic or prokaryotic cell or organism from animal, plant or microbial origin for applications in areas such as plant or animal health, food protection, agriculture and environment.
  - b. Biological Control  
This category includes inventions using natural or modified organisms, genes or gene products from animal, plant, or microbial origin to reduce the effects of pests or diseases for applications in areas such as plant or animal health, food protection, agriculture and environment.
2. Plant Variety Protection:  
Form of intellectual property protection in United States, adapted for the process of plant breeding and managed under the International Union for the Protection of New Varieties of Plants - UPOV), issued as US Plant Patents by the US Patent and Trademark Office.
3. Products and Equipment:
  - a. Processing & Related Product, including food processing, packaging  
This category includes inventions using a variety of operations or treatments by which a material of plant, animal or microbial origin is being altered or converted into another form or resulting in new products for applications in areas such as food processing, food protection and agriculture.
  - b. Equipment (laboratory, harvesting, processing)  
This category includes inventions related to any kind of instruments, equipment or machinery mobile or fixed used in laboratories, or to help the various work in food production.
  - c. Robotics  
This category includes inventions related to methods and techniques used for the conception and use of robots and robotic instruments executing mechanical tasks in various applications.

and
4. New trends:
  - a. Artificial Intelligence  
This category includes inventions related to the manipulation of digitized information and data by computer and other digital equipment during the acquisition, recording, organization, display and dissemination of this information and data for various applications;  
or
  - b. Information processing  
This category includes inventions related to the manipulation of digitized information and data by computer and other digital equipment during the acquisition, recording, organization, display and dissemination of this information and data for applications in areas such as food protection, agriculture and environment;  
or
  - c. Clean technology  
This category includes inventions related to technologies, products or methods or processes that reduces negative environmental impacts through significant energy efficiency improvements, the sustainable use of resources, or environmental protection activities.

1. The Senior Patent Agent and Junior Patent Agent must perform the following Tasks when required, which are the same for all four categories:

The Senior Patent Agent will lead completion of the following tasks with the Junior Patent Agent to complete under the supervision of the Senior Patent Agent

1.1. FREEDOM TO OPERATE ASSESSMENTS including but not limited to:

- a) Interviewing inventors and other AAFC personnel
- b) Conducting patent or trademark searches
- c) Providing intellectual property protection opinions, advice and strategies with respect to dealing with external patents (issued or published) that may conflict with AAFC patents.

1.2. PATENTABILITY ASSESSEMENTS including but not limited to:

- a) Interviewing inventors and other AAFC personnel
- b) Conducting patent or trademark searches
- c) Conducting prior art searches

1.3. FILING & PROSECUTING PATENT APPLICATIONS including but not limited to:

- a) Interviewing inventors and other AAFC personnel
- b) Conducting patent or trademark searches
- c) Conducting prior art searches
- d) Drafting and filing patent documents:
  - i. provisional applications
  - ii. regular patent applications
  - iii. continuation-in-part, continuation, divisional applications
  - iv. Patent Cooperation Treaty (PCT) and foreign applications
  - v. Filing, transmittal, assignment, power of attorney documents
- e) Submitting documents to patent offices and foreign associates in Canada and in foreign jurisdictions. (Documents must be submitted at least one (1) week prior to deadline date received from the Patent Office)
- f) Receiving, reviewing and responding to correspondence with patent offices and foreign associates. (All Correspondence must be sent within five (5) working days of receipt via email to the File Manager, with a copy to the Patent Portfolio Manager, Office of Intellectual Property and Commercialization and the Commercialization Assistant)
- g) Maintaining records of due dates for all patent applications under their development (Records of due dates must be sent via email to the designated AAFC File Manager, with copies to the Patent Portfolio Manager, Office of Intellectual Property and Commercialization and the Commercialization Assistant)
- h) When requested, providing estimated costs and forecasts for actions related to patent files that are managed by the Contractor
- i) Executing ensuing patent prosecution up to the date of patent issuance

2. The Offeror may be required to provide advice on:

2.1. IP protection strategies for patents and trademarks

2.2. General IP protection not related to specific AAFC patents or trademarks as required by AAFC's Office of Intellectual Property and Commercialization.

2.3. IP protection opinions and strategies with respect to actions taken against AAFC's intellectual property assets.

3. The Offeror may be required to make presentations to AAFC staff on IP topics.

4. For each Patent pursued, the Offeror will prepare a QUARTERLY REPORT in a spreadsheet format (i.e. Microsoft Excel) for each of the following periods:

Quarter 1 - April 1 to June 30  
Quarter 2 - July 1 to September 30  
Quarter 3 - October 1 to December 31  
Quarter 4 - January 1 to March 31

The Reports must contain the following information:

- a) Title of patent or application
- b) Country or Region
- c) Application number
- d) Contractor's file reference number

- e) AAFC's file reference
- f) Estimated Costs for the fiscal year (April - March) including anticipated office action responses, filing fees, issue fees, reporting costs
- g) Annuity fee due date

The Reports will be due no less than one (1) month prior to the start date of the next quarter and submitted to the Patent Portfolio Manager, Office of Intellectual Property and Commercialization and the Commercialization Assistant via email.

5. All correspondence on individual patent files provided to AAFC must include the following information:
- a) Application number
  - b) Title of technology
  - c) Jurisdiction
  - d) AAFC reference number
  - e) Agent reference number
  - f) First named inventor

Correspondence will sent via email to the File Manager, with copies to the Patent Portfolio Manager, Office of Intellectual Property and Commercialization and the Commercialization Assistant.

6. The Offeror must provide deliverables specific to individual Call-ups which may include but are not limited to:
- a) Reports on:
    - i. searches
    - ii. patentability and freedom to operate assessments
    - iii. opinions
    - iv. strategies
  - b) Copies of patent applications, original records of patent filings, correspondence from patent offices, responses to office actions, Letters Patent and all other related correspondence.

The Offeror is responsible for the timely handling and filing of submissions to the patent offices and must notify the File Manager and the Patent Portfolio Manager, Office of Intellectual Property and Commercialization and the Commercialization Assistant of relevant deadlines. If it is determined that a delay or lack of action which resulted in additional costs or late fees was the fault of the Contractor, then the Contractor shall be responsible for payment of these fees.

3. Clerical Assistant services may include but are not limited to: submission of documents to patent offices and foreign associates, maintaining records of due dates for all patent applications, invoicing, filing, and assistance with reporting.

Throughout the Standing Offer and active Call-up period, the successful firm and all the resources must continue to demonstrate that it's Senior and Junior Patent Agents meet the mandatory criteria.

#### **FEES:**

The prosecuting Patent Agent must pay all fees up to the date of issuance of the patent (including the issue fee), unless AAFC specifically advises otherwise in writing.

#### **REPORTING AND COMMUNICATIONS:**

The Offeror is responsible for communicating with AAFC's Files Managers, inventors, associated Patent Agents in other countries, Patent Agents working on behalf of parties which have licensed AAFC patents and Justice Canada to perform the work described within each authorized call-up.

#### **LANGUAGE REQUIREMENTS:**

Patent preparation and communication with the inventors may be required in either of Canada's official languages (English or French) as requested by the File Manager.

Work will be performed and dealings with federal public servants and inventors will be in the official language of Canada's choice.

The Offeror must deliver services in both official languages either through bilingual Patent Agents on staff or through contracted translators at no additional charge to Canada.

## ANNEX "B"

### BASIS OF PAYMENT

#### INSTRUCTIONS

- This section when complete will be considered the Offeror's financial proposal.
- Offers must providing pricing for the Category in its' complete the Basis of Payment (e.g. Basis of Payment 1, Basis of Payment 2, Basis of Payment 3, Basis of Payment 4) for EACH category for which they wish to be evaluated.
- If the Offeror adds any conditions or makes changes to the pricing schedule the Offerors financial bid will be deemed non-responsive.
- Offerors must fill in every cell in each table where unit pricing is requested. Failure to fill in any cell where unit pricing is requested will deem the bid non-responsive.
- Estimated usages on the following tables are for evaluation purposes only, and do not guarantee any amount of actual usage. They will not form part of the final Standing Offer. Actual usages may vary from the estimated usages recorded in the following tables.

#### PRICES

- Prices must remain firm for the duration of the Standing Offer.
- GST/HST is to be excluded from the prices stated herein. Applicable taxes are to be shown as a separate item on any invoices.

#### FINANCIAL EVALUATION

The financial evaluation will be done by Category.

Reference Annex B - Basis of Payment for each Category:

##### Category 1:

Table 1 Line item 4C Total Evaluated Price + Table 2 Line item 4C Total Evaluated price + Table 3 Line item 4C Total Evaluated price + Table 4 Line item 4C Total Evaluated Price + Table 5 Line item 4C Total Evaluated Price = Evaluated Price for Category 1

##### Category 2:

Table 2 Line item 4C Total Evaluated Price + Table 2 Line item 4C Total Evaluated Price + Table 3 Line item 4C Total Evaluated Price + Table 4 Line item 4C Total Evaluated Price + Table 5 Line item 4C Total Evaluated Price = Evaluated Price for Category 2

##### Category 3:

Table 3 Line item 4C Total Evaluated Price + Table 2 Line item 4C Total Evaluated Price + Table 3 Line item 4C Total Evaluated Price + Table 4 Line item 4C Total Evaluated Price + Table 5 Line item 4C Total Evaluated Price = Evaluated Price for Category 3

##### Category 4:

Table 4 Line item 4C Total Evaluated Price + Table 2 Line item 4C Total Evaluated Price + Table 3 Line item 4C Total Evaluated Price + Table 4 Line item 4C Total Evaluated Price + Table 5 Line item 4C Total Evaluated Price = Evaluated Price for Category 4

#### IDENTIFICATION

**Name of Senior Patent Agent:** *[to be inserted at standing offer issuance]*

**Name of Junior Patent Agent:** *[to be inserted at standing offer issuance]*

**Name of Clerical Assistant** *[to be inserted at standing offer issuance]*

#### LABOUR RATES

Unit prices offered must be exclusive of all direct charges and applicable taxes.

---

## DIRECT CHARGES

- a. Reimbursement for costs necessarily and reasonably incurred by the Offeror in the execution of the work limited to the following categories:
  - Administration Fees - includes but is not limited to office supplies, photocopying, Long Distance charges and Distribution costs
  - Official Fees - includes Patent office Fees such as filing and examination fees, maintenance fees prior to issuance, issuance fees and foreign associate fees which are paid on the Crown's behalf
- b. All Direct Charges will be reimbursed at actual cost without markup.
- c. Receipts for all *Official Fees* paid on the Crown's behalf are required for reimbursement

## CALL-UP CONTRACT EXTENSION AND RESULTANT CONTRACT LABOUR RATES

As the timeline for a patent to issue in all countries from the initial evaluation can easily be greater than eight years, the rates for active call-ups against the standing offer (for which work has not yet been completed) that were issued during the period of the standing offer will be established as detailed below.

Where it is required to extend the call-up to complete the work, and where the standing offer is still active, rates in the standing offer, including rates identified for option years that are not yet exercised, will be applicable for any extensions to the call-up that have a service requirement due date that still falls within the period of the standing offer and the potential option years.

Where it is necessary to extend the call-up or a portion of the period of the call-up beyond the expiration date of the standing offer and any option years (whether or not the option years are exercised), and where the standing offer is still active, AAFC will negotiate rates with the Offeror 30 days, prior to the expiry date of the call-up contract, for all portions of the work that will fall outside the period of the standing offer and any potential option years (i.e. for any period for which a price is not already set in the standing offer). The negotiated rates will be in no event to exceed the consumer price index as determined at time AAFC extends the call-up contract. The last Labour Rates will be the interim Labour Rates until the new Labour Rates are negotiated.

After the standing offer has expired, for any existing call-up contracts, AAFC will negotiate new Labour Rates with the Offeror each year by the expiry date of the call-up contract. These yearly negotiated Labour Rates will in no event exceed the consumer price index of the year in which the negotiations take place. If, by the anniversary date of the call-up contract, negotiations have not been successful, the consumer price index last published before the expiry date of the call-up contract will be used to establish the maximum Labour Rate for the following year.

**BASIS OF PAYMENT 1: CATEGORY #1 – BIOTECHNOLOGIES**

**TABLE 1: Year One** October 1, 2020 to September 30, 2021

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	275	/hour	\$
2	Junior Patent Agent	Hour	180	/hour	\$
3	Clerical Assistant	Hour	50	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**TABLE 2: Year Two** October 1, 2021 to September 30, 2022

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	275	/hour	\$
2	Junior Patent Agent	Hour	180	/hour	\$
3	Clerical Assistant	Hour	50	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**TABLE 3: Option Year One** October 1, 2022 to September 30, 2023

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Cost in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	325	/hour	\$
2	Junior Patent Agent	Hour	200	/hour	\$
3	Clerical Assistant	Hour	60	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$



**TABLE 4: Option Year Two** October 1, 2023 to September 30, 2024

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	325	/hour	\$
2	Junior Patent Agent	Hour	200	/hour	\$
3	Clerical Assistant	Hour	60	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**TABLE 5: Option Year Three** October 1, 2024 to September 30, 2025

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	325	/hour	\$
2	Junior Patent Agent	Hour	200	/hour	\$
3	Clerical Assistant	Hour	60	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**BASIS OF PAYMENT 2: CATEGORY #2 – PLANT VARIETY PROTECTION**

**TABLE 1: Year One** October 1, 2020 to September 30, 2021

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	50	/hour	\$
2	Junior Patent Agent	Hour	20	/hour	\$
3	Clerical Assistant	Hour	10	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**TABLE 2: Year Two** October 1, 2021 to September 30, 2022

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	50	/hour	\$
2	Junior Patent Agent	Hour	20	/hour	\$
3	Clerical Assistant	Hour	10	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**TABLE 3: Option Year One** October 1, 2022 to September 30, 2023

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	60	/hour	\$
2	Junior Patent Agent	Hour	25	/hour	\$
3	Clerical Assistant	Hour	10	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**TABLE 4: Option Year Two** October 1, 2023 to September 30, 2024

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	60	/hour	\$
2	Junior Patent Agent	Hour	25	/hour	\$
3	Clerical Assistant	Hour	10	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**TABLE 5: Option Year Three** October 1, 2024 to September 30, 2025

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	60	/hour	\$
2	Junior Patent Agent	Hour	25	/hour	\$
3	Clerical Assistant	Hour	10	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**BASIS OF PAYMENT 3: CATEGORY #3 –PRODUCTS & EQUIPMENT**

**TABLE 1: Year One** October 1, 2020 to September 30, 2021

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	60	/hour	\$
2	Junior Patent Agent	Hour	30	/hour	\$
3	Clerical Assistant	Hour	15	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**TABLE 2: Year Two** October 1, 2021 to September 30, 2022

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	60	/hour	\$
2	Junior Patent Agent	Hour	30	/hour	\$
3	Clerical Assistant	Hour	15	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**TABLE 3: Option Year One** October 1, 2022 to September 30, 2023

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	70	/hour	\$
2	Junior Patent Agent	Hour	35	/hour	\$
3	Clerical Assistant	Hour	15	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**TABLE 4: Option Year Two** October 1, 2023 to September 30, 2024

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	70	/hour	\$
2	Junior Patent Agent	Hour	35	/hour	\$
3	Clerical Assistant	Hour	15	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**TABLE 5: Option Year Three** October 1, 2024 to September 30, 2025

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	70	/hour	\$
2	Junior Patent Agent	Hour	35	/hour	\$
3	Clerical Assistant	Hour	15	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**BASIS OF PAYMENT 4: CATEGORY #4 – NEW TRENDS**

**TABLE 1: Year One** October 1, 2020 to September 30, 2021

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	50	/hour	\$
2	Junior Patent Agent	Hour	20	/hour	\$
3	Clerical Assistant	Hour	10	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**TABLE 2: Year Two** October 1, 2021 to September 30, 2022

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	50	/hour	\$
2	Junior Patent Agent	Hour	20	/hour	\$
3	Clerical Assistant	Hour	10	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**TABLE 3: Option Year One** October 1, 2022 to September 30, 2023

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	60	/hour	\$
2	Junior Patent Agent	Hour	25	/hour	\$
3	Clerical Assistant	Hour	15	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

**TABLE 4: Option Year Two** October 1, 2023 to September 30, 2024

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	60	/hour	\$
2	Junior Patent Agent	Hour	25	/hour	\$
3	Clerical Assistant	Hour	15	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$


**TABLE 5: Option Year Three** October 1, 2024 to September 30, 2025

Line Item #	Description	Unit	Estimated # of Units (A)	Unit Price Offered in CAD (B)	Extended Total in CAD (C) = (A x B)
1	Senior Patent Agent	Hour	60	/hour	\$
2	Junior Patent Agent	Hour	25	/hour	\$
3	Clerical Assistant	Hour	15	/hour	\$
4	Total Evaluated Price (sum of Extended Total column for lines 1, 2 and 3)				\$

ANNEX "C"

SECURITY REQUIREMENTS CHECK LIST

SACL 822-122019

 Government of Canada Gouvernement du Canada	Contract Number / Numéro du contrat <b>01R11-20-S009</b> Security Classification / Classification de sécurité
---	---

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

<b>PART A: CONTRACT INFORMATION / PARTIE A: INFORMATION DU CONTRAT</b>	
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine AAFC	2. Branch or Directorate / Direction générale ou Direction Science & Technology
3. a) Subcontract Number / Numéro du contrat de sous-traitance N/A	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant N/A
4. Brief Description of Work / Brève description du travail Patent Agent Services (standing offer) for protection of AAFC intellectual property. See attached Statement of Work.	


5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes
6. Indicate the type of access required / Indiquer le type d'accès requis	
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes

7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>

7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>	Restricted to / Limité à : <input type="checkbox"/>	Restricted to / Limité à : <input type="checkbox"/>
Specify country(ies) / Préciser le(s) pays :	Specify country(ies) / Préciser le(s) pays :	Specify country(ies) / Préciser le(s) pays :

7. c) Level of information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET <input type="checkbox"/>
TOP SECRET <input type="checkbox"/>		TOP SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) <input type="checkbox"/>
TRÈS SECRET (SIGINT) <input type="checkbox"/>		TRÈS SECRET (SIGINT) <input type="checkbox"/>

TBS/ICT 350-103(2004/12)

Security Classification / Classification de sécurité	
--	---





Government  
of Canada  
Gouvernement  
du Canada

Contract Number / Numéro du contrat

01R11-20-5009  
Security Classification / Classification de sécurité

**PART A (continued) / PARTIE A (suite)**

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?  
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? ☒ No ☐ Yes  
Non ☐ 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 ☐ Yes  
Non ☐ 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 unaccredited personnel be used for portions of the work?  
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? ☒ No ☐ Yes  
Non ☐ Oui

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

**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 ☒ Yes  
Non ☐ 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 ☐ Yes  
Non ☐ 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 ☐ Yes  
Non ☐ 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 ☒ Yes  
Non ☐ 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 ☐ Yes  
Non ☐ Oui

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité

Canada



Government  
of Canada

Gouvernement  
du Canada

Contract Number / Numéro du contrat

01R11-20-5009  
Security Classification / Classification de sécurité

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

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.  
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						COMSEC					
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COMSEC TOP SECRET	COMSEC CONFIDENTIAL	COMSEC SECRET	CONFIDENTIAL	SECRET	TOP SECRET	CONFIDENTIAL	SECRET
Information / Assets Renseignements / Biens																	
Production																	
IT Assets / Support TI																	
IT Link / Lien électronique																	

12 a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?

La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

☒ No  
Non

☐ Yes  
Oui

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

12 b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?

La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

☒ No  
Non

☐ Yes  
Oui

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

## **ANNEX "D"**

### **INSTRUCTIONS FOR ANNEXES "E" THROUGH "F"**

A complete list of the Mandatory Technical Criteria for each Category is detailed in Annexes "E" through "F".

In order to facilitate the evaluation Canada requests the Offeror submit matrices in Annex "E" "AND the Annexes "F" through "I" for each Category for which the Offeror wishes to be evaluated. If proposals are submitted instead of the annexes, the information in the proposals should clearly address where in the bid the mandatory criteria has been addressed identifying the specific paragraph and page number.

The Offeror must clearly demonstrate in its bid how it meets each of the mandatory technical criteria in Annex "E" and also in Annexes "F" to "I" for EACH Category that it bids on. Mandatory technical criteria are evaluated on a "met" or "not met" basis. Offers which fail to meet all of the mandatory technical evaluation will be declared non-responsive not be given further consideration. Bidders must address any concerns with the performance specifications in written detail to the Contracting Authority before bid closing as outlined in the Request for Proposal (RFSO) document.

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 or stating, without any substantiating information, that a bidder is compliant is not sufficient.

Substantiating information may include, but is not limited to: issued patents or Plant Breeders' Rights certificates to demonstrate the Offeror as the prosecutor for the patents or Plant Breeders' Rights; Senior and Junior Patent Agent certificates and Education Diplomas. If published supporting technical documentation is not available (such as a combination of education work experience), the Bidder should prepare a written narrative complete with a detailed explanation of how its bid demonstrates technical compliance. All substantiating information should be provided with the bid at solicitation closing date. It is the Bidders responsibility to ensure that the submitted supporting technical documentation provides detail to demonstrate that the requirements of the evaluation criteria. Canada will not evaluate information such as references to Website addresses where additional information can be found.

Supporting documentation required and referenced in Annexes "E" through "I" should be provided prior to bid closing. If the supporting documentation has not been provided by bid closing, the Contracting Authority will notify the Bidder that they must provide supporting documentation within two (2) business days following notification. Failure to comply with the request of the Contracting Authority within that time period will deem the bid non-responsive and the bid will not be given further consideration.

Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
wpg113  
CCC No./N° CCC - FMS No./N° VME

---

Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
WPG113  
CCC No./N° CCC - FMS No./N° VME

**ANNEX "E"**

**MANDATORY TECHNICAL CRITERIA FOR OFFEROR FOR ALL CATEGORIES**

The Offeror must demonstrate how it meets the following mandatory technical criteria:

Mandatory	Description	Offeror Acceptance and Response
M1	The Offeror must offer services in both official languages either through bilingual Patent Agents on staff or through contracted translators at no additional charge to Canada by providing attestation of their agreement.	Offeror to Insert Attestation of Their Agreement by Signing _____

ANNEX "F"

MANDATORY TECHNICAL CRITERIA FOR CATEGORY 1 - BIOTECHNOLOGIES

1. MANDATORY TECHNICAL CRITERIA FOR OFFEROR

The Offeror must demonstrate how it meets the following mandatory criteria:

Mandatory	Description	Offeror Acceptance and Response
M1	<p>The Offeror must provide evidence it has successfully prosecuted two (2) patent families* in which patents have been issued in:</p> <ol style="list-style-type: none"><li>1. Canada,</li><li>2. United States and</li><li>3. at least two (2) countries outside of North America,</li></ol> <p>in the past five (5) years (from the date of posting of this solicitation), which falls in Category #1 - Biotechnologies.</p> <p>To demonstrate the Offeror must provide:</p> <ul style="list-style-type: none"><li>- a copy of the cover page of each issued patent for a given patent family, and</li><li>- a rationale on how each patent family falls into Category #1 – Biotechnologies as defined in the “Scope of Work” section of Annex A (Statement of Work).</li></ul> <p><b>If greater than two are submitted only the first two will be evaluated.</b></p> <p>(*A 'patent family' is defined as a set of patents that are linked by a common priority document and priority date.).</p>	<p>Complete the tables (Patent Family A and Patent Family B) below with all information demonstrating M1 are met.</p>

Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
WPG113  
CCC No./N° CCC - FMS No./N° VME

**M1 Tables for completion by Offeror.**

Bidder Response or Cross Reference to Page and Paragraph within Technical Offer Where M1 Demonstrated				
Patent Family A				
Title of the patent				
Countries, Reference Number and Date of issuance of the patents		Country	Patent Number	Date of issuance of patent
		Canada		Cross Reference in Bid Where Cover page of issued patent included.
		United States of America		
		Country outside NA #1		
		Country outside NA #2		
Explain how the patent family falls into Category #1 – Biotechnologies as defined in the “Scope of Work” section of Annex A (Statement of Work).				

Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
WPG113  
CCC No./N° CCC - FMS No./N° VME

Patent Family B	Bidder Response or Cross Reference to Page and Paragraph within Technical Offer Where M1 Demonstrated				
Title of the patent					
Countries, Reference Number and Date of issuance of the patents		Country	Patent Number	Date of issuance of patent	Cross Reference in Bid where Cover page of issued patent included.
		Canada			
		United States of America			
		Country outside NA #1			
		Country outside NA #2			
Explain how the patent family falls into Category #1 – Biotechnologies as defined in the “Scope of Work” section of Annex A (Statement of Work).					



Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
WPG113  
CCC No./N° CCC - FMS No./N° VME

## 2. MANDATORY TECHNICAL CRITERIA FOR SENIOR PATENT AGENT

### PATENT EDUCATION AND EXPERIENCE

Mandatory	Description	Offeror Must Include Following Information for Evaluation to Demonstrate	Bidder to Insert Information how Mandatory is Met in Table or Cross Reference in Technical Offer Where Demonstrated
M2	The Senior Patent Agent must be registered to practice with Canadian Intellectual Property Office (CIPO) for a minimum of five (5) years from date of RFSO closing  *Bidder must provide a copy of the certificate	Name of Senior Patent Agent  Certification Number  Copy of certificate  Date of registration with the Canadian Intellectual Property Office (CIPO)	
M3	The Senior Patent Agent must be registered with the US Patent Trademark Office for a minimum of five (5) years from date of RFSO closing  *Bidder must provide a copy of the certificate	Name of Patent Agent  Certification Number  Copy of certificate  Date of registration with the US Patent Trademark Office	

Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
WPG113  
CCC No./N° CCC - FMS No./N° VME

**SCIENTIFIC EDUCATION AND RESEARCH EXPERIENCE**

Mandatory	Description	Offeror to Include Following Information for Evaluation	Bidder to Insert Information how Mandatory is Met or Cross Reference in Technical Offer Where Demonstrated
M4	<p>The Senior Patent Agent must meet two (2) of the three (3) criteria listed below:</p> <ul style="list-style-type: none"><li>• Education - Bachelor of Science Degree in Microbiology, Biology, Molecular Biology, Cell Biology, Biochemistry, or other field that is related to category 1 Biotechnologies.</li><li>• Post graduate degree in one (1) of the above areas</li></ul> <p>Bidders must provide copies of diplomas.</p> <ul style="list-style-type: none"><li>• Minimum of two (2) or more years (24 months) cumulative research work experience - post-doctoral or other research experience related to category 1 Biotechnologies</li></ul> <p>*Bidder must provide a copy of the diploma</p>	Bachelor degree obtained (specify the field) and provide copy of diploma	
		Post graduate degree obtained (specify the field) and provide copy of diploma	
		Dates and description of research work experience – post-doctoral or other research experience in the field of molecular biology or biological control. *Bidder must demonstrate a minimum of 2 years (24 months) cumulative work experience.	For <u>each</u> research work experience cited provide:  Date From: (month and year)  Date To: (month and year)  Field:  Type (e.g. Post-doctoral, other)  Description

**3. MANDATORY TECHNICAL CRITERIA FOR THE JUNIOR PATENT AGENT**

**PATENT EDUCATION AND EXPERIENCE**

Mandatory	Description	Offeror Must Include Following Information for Evaluation to Demonstrate	Bidder to Insert Information or Cross Reference in Technical Offer Where Demonstrated
M5	The Junior Patent Agent must be registered to practice with Canadian Intellectual Property Office (CIPO) for a minimum of two (2) years from date of RFSO closing  *Bidder must provide a copy of the certificate	Name of Junior Patent Agent	
		Certification Number and copy of certificate	
		Date of registration as a patent agent in Canada	

**SCIENTIFIC EDUCATION**

Mandatory	Description	Offeror Must Include Following Information for Evaluation to Demonstrate	Bidder to Insert Information or Cross Reference in Technical Offer Where Demonstrated
M6	The Junior Patent Agent must meet the criteria below: <ul style="list-style-type: none"><li>Education - Bachelor of Science Degree in Microbiology, Biology, Molecular Biology, Cell Biology, Biochemistry, or Plant Genetics, or other field that is related to category 1 Biotechnologies.</li></ul> *Bidder must provide a copy of the diploma	Bachelor degree obtained (specify the field)  Copy of diploma to be provided.	

ANNEX "G"

MANDATORY TECHNICAL CRITERIA FOR CATEGORY #2 – PLANT VARIETY PROTECTION

1. MANDATORY TECHNICAL CRITERIA FOR OFFEROR

The Offeror must demonstrate how it meets the following mandatory criteria:

Mandatory	Description	Offeror Acceptance and Response
M1	<p>The Offeror must provide evidence it has successfully prosecuted, US Plant Patent in United States for two (2) different varieties* in the past five (5) years (from date of posting of this solicitation).</p> <p>The Offeror must provide a copy of the cover page of each issued US Plant Patent for each variety.</p> <p><b>If greater than two are submitted only the first two will be evaluated.</b></p> <p>(*A 'variety' is defined as a plant that has been created or selected intentionally and maintained through cultivation and is morphologically, chemically or genetically distinct, uniform in growth and appearance and genetically stable. The plant may have been recognized by registration or certification by an official body.)</p>	<p>Complete the tables (Patent Family A and Patent Family B) below with all information demonstrating M1 is met.</p>

Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
WPG113  
CCC No./N° CCC - FMS No./N° VME

**M1 Tables for completion by Offeror.**

Plant Variety A	Bidder Response or Cross Reference to Page and Paragraph within Technical Offer Where M1 Demonstrated
Registered name of the variety	
Patent Number and Date of issuance (include copy of Cover page of the Patent)	

Plant Variety B	Bidder Response or Cross Reference to Page and Paragraph within Technical Offer Where M1 Demonstrated
Registered name of the variety	
Patent Number and Date of issuance (include copy of Cover page of the Patent)	

## 2. MANDATORY TECHNICAL CRITERIA FOR SENIOR PATENT AGENT

### PATENT EDUCATION AND EXPERIENCE

Mandatory	Description	Offeror Must Include Following Information for Evaluation to Demonstrate	Bidder to Insert Information how Mandatory is Met in Table or Cross Reference in Technical Offer Where Demonstrated
M2	The Senior Patent Agent must be registered with the US Patent Trademark Office for a minimum of five (5) years from date of RFSO closing *Bidder must provide a copy of the certificate	Name of Patent Agent Certification Number and copy of certificate Date of registration with the US Patent Trademark Office	

### SCIENTIFIC EDUCATION AND RESEARCH EXPERIENCE

Mandatory	Description	Offeror to Include Following Information for Evaluation	Bidder to Insert Information or Cross Reference in Technical Offer Where Demonstrated
M3	The Senior Patent Agent must meet two (2) of the three (3) criteria listed below: <ul style="list-style-type: none"><li>Education - Bachelor of Science Degree in Crop Science, Plant Biology, Plant Science, Botany, or other field that is related to category 2 – Plant Variety Protection.</li><li>Post graduate degree in one (1) of the above areas</li></ul> Copy of diploma must be provided. <ul style="list-style-type: none"><li>Minimum of two (2) or more years (24 months) research work experience - post-doctoral or other research experience in the field related to category 2 – Plant Variety Protection.</li></ul>	Bachelor degree obtained (specify the field) and provide a copy of the diploma. Post graduate degree obtained (specify the field) and provide a copy of the diploma. Dates and description of research work experience – post-doctoral or other research experience in the field of plant patents and plant variety protection. *Bidder must demonstrate a minimum of 2 years (24 months) experience.	For <u>each</u> research work experience cited provide Date From (month year): Date To (month year): Field: Type (e.g. Post-doctoral, other) Description:

Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
WPG113  
CCC No./N° CCC - FMS No./N° VME

### 3. MANDATORY TECHNICAL CRITERIA FOR THE JUNIOR PATENT AGENT

#### SCIENTIFIC EDUCATION

Mandatory	Description	Offeror to Include Following Information for Evaluation	Bidder to Insert Information or Cross Reference in Technical Offer Where Demonstrated
M4	<p>The Junior Patent Agent must meet the criteria below:</p> <ul style="list-style-type: none"><li>• Education - Bachelor of Science Degree in Bachelor of Science Degree in Crop Science, Plant Biology, Plant Science, or Botany, or other field that is related to category 2 – Plant Variety Protection.</li></ul> <p>*Bidder must provide a copy of the diploma.</p>	<p>Bachelor degree obtained (specify the field)</p> <p>Copy of diploma.</p>	

**ANNEX "H"**

**MANDATORY TECHNICAL CRITERIA FOR CATEGORY #3 – PRODUCTS AND EQUIPMENT**

**1. MANDATORY TECHNICAL CRITERIA FOR OFFEROR**

The Offeror must demonstrate how it meets the following mandatory criteria:

Mandatory	Description	Offeror Acceptance and Response
M1	<p>The Offeror must provide evidence it has successfully prosecuted two (2) patent families* in which patents have been issued in:</p> <ul style="list-style-type: none"><li>• Canada,</li><li>• United States, and</li><li>• at least two (2) countries outside of North America, in the past five (5) years (from date of posting of this solicitation), and which falls in Category #3 – Products and Equipment.</li></ul> <p>To demonstrate the Offeror must provide:</p> <ul style="list-style-type: none"><li>- a copy of the cover page of each issued patent for a given patent family, and</li><li>- a rationale on how each patent family falls into Category #3 – Products and Equipment as defined in the "Scope of Work" section of Annex A (Statement of Work)</li></ul> <p><b>If greater than two are submitted only the first two will be evaluated.</b></p> <p>(*A 'patent family' is defined as a set of patents that are linked by a common priority document and priority date.).</p>	<p>Complete the tables (Patent Family A and Patent Family B) below with all information demonstrating M1 met.</p>



Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
WPG113  
CCC No./N° CCC - FMS No./N° VME

**M1 Tables for completion by Offeror.**

Patent Family A					Bidder Response or Cross Reference to Page and Paragraph within Technical Offer Where M1 Demonstrated	
Title of the patent						
Countries, Reference Number and Date of issuance of the patents		Country	Patent Number	Date of issuance of patent	Cross Reference in Bid where Cover page of issued patent included	
		Canada				
		United States of America				
		Country outside NA #1				
		Country outside NA #2				
Explain how the patent family falls into Category #3 – Products and Equipment as defined in the “Scope of Work” section of Annex A (Statement of Work).						

Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
WPG113  
CCC No./N° CCC - FMS No./N° VME

Patent Family B					Bidder Response or Cross Reference to Page and Paragraph within Technical Offer Where M1 Demonstrated	
Title of the patent						
Countries, Reference Number and Date of Issuance of the patents		Country	Patent Number	Date of issuance of patent	Cross Reference in Bid where Cover page of issued patent included	
		Canada				
		United States of America				
		Country outside NA #1				
		Country outside NA #2				
Explain how the patent family falls into Category #3 – Products and Equipment as defined in the “Scope of Work” section of Annex A (Statement of Work).						

Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
WPG113  
CCC No./N° CCC - FMS No./N° VME

## 2. MANDATORY TECHNICAL CRITERIA FOR SENIOR PATENT AGENT

### PATENT EDUCATION AND EXPERIENCE

Mandatory	Description	Offeror Must Include Following Information for Evaluation to Demonstrate	Bidder to Insert Information how Mandatory is Met in Table or Cross Reference in Technical Offer Where Demonstrated
M2	The Senior Patent Agent must be registered to practice with Canadian Intellectual Property Office (CIPO) for a minimum of five (5) years from date of RFSO closing *Bidder must provide a copy of the certificate	Name of Senior Patent Agent Certification Number and provide a copy of certificate Date of registration with the Canadian Intellectual Property Office (CIPO)	
M3	The Senior Patent Agent must be registered with the US Patent Trademark Office for a minimum of five (5) years from date of RFSO closing *Bidder must provide a copy of the certificate	Name of Patent Agent Certification Number and provide a copy of certificate. Date of registration with the US Patent Trademark Office	

Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
WPG113  
CCC No./N° CCC - FMS No./N° VME

**SCIENTIFIC EDUCATION AND RESEARCH EXPERIENCE**

Mandatory	Description	Offeror to Include Following Information for Evaluation	Bidder to Insert Information or Cross Reference in Technical Offer Where Demonstrated
M4	<p>The Senior Patent Agent must meet two (2) of the three (3) criteria listed below:</p> <ul style="list-style-type: none"><li>• Education - Bachelor of Science Degree in Food Chemistry, Chemistry, Natural Products Chemistry, Chemical Engineering or a Bachelor of Engineering Degree in Biomedical, Mechanical, or Chemical, or other field that is related to Category #3 – Products and Equipment.</li><li>• Post graduate degree in one (1) of the above areas</li></ul> <p>Copies of diplomas must be provided.</p> <ul style="list-style-type: none"><li>• Minimum of two (2) years (24 months) cumulative research work experience - post-doctoral or other research experience related to Category #3 – Products and Equipment</li></ul>	<p>Bachelor degree obtained (specify the field)</p> <p>Copy of diploma.</p> <p>Post graduate degree obtained (specify the field)</p> <p>Copy of diploma.</p> <p>Dates and description of research work experience – post-doctoral or other research experience in the field of Category #3 – Products and Equipment.</p> <p>*Bidder must demonstrate a minimum of 2 years (24 months) experience.</p>	<p>For each <u>research</u> work experience cited provide:</p> <p>Date From (month year):</p> <p>Date To (month year):</p> <p>Field:</p> <p>Type (e.g. Post-doctoral, other)</p> <p>Description</p>

Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
WPG113  
CCC No./N° CCC - FMS No./N° VME

## 2. MANDATORY TECHNICAL CRITERIA FOR THE JUNIOR PATENT AGENT

### PATENT EDUCATION AND EXPERIENCE

Mandatory	Description	Offeror Must Include Following Information for Evaluation to Demonstrate	Bidder to Insert Information or Cross Reference in Technical Offer Where Demonstrated
M5	The Junior Patent Agent must be a registered patent agent in Canada for a minimum of two (2) years of experience drafting and prosecuting patent applications.  *Bidder must provide a copy of the certificate	Name of Junior Patent Agent	
		Certification Number and provide a copy of certificate.	
		Date of registration as a patent agent in Canada	

### SCIENTIFIC EDUCATION

Mandatory	Description	Offeror to Include Following Information for Evaluation	Bidder to Insert Information or Cross Reference in Technical Offer Where Demonstrated
M6	The Junior Patent Agent must meet the criteria below: <ul style="list-style-type: none"><li>Education - Bachelor of Science Degree in Food Chemistry, Chemistry, Natural Products Chemistry, Chemical Engineering or a Bachelor of Engineering Degree in Biomedical, Mechanical, or Chemical, or other field that is related to Category #3 – Products and Equipment.</li></ul> Bidder must provide copy of diploma.	Bachelor degree obtained (specify the field)  Copy of diploma.	

**ANNEX "I"**

**MANDATORY TECHNICAL CRITERIA FOR CATEGORY #4 – NEW TRENDS**

**1. MANDATORY TECHNICAL CRITERIA FOR OFFEROR**

The Offeror must demonstrate how it meets the following mandatory criteria:

Mandatory	Description	Offeror Acceptance and Response
M1	<p>The Offeror must provide evidence it has successfully prosecuted two (2) patent families* in which patents have been issued in:</p> <ul style="list-style-type: none"><li>• Canada,</li><li>• United States, and</li><li>• at least two (2) countries outside of North America,</li></ul> <p>in the past five (5) years (from date of posting of this solicitation) which falls in Category #4 – New Trends.</p> <p>To demonstrate the Offeror must provide:</p> <ul style="list-style-type: none"><li>- a copy of the cover page of each issued patent for a given patent family, and</li><li>- a rationale on how each patent family falls into Category #4 – New Trends as defined in the "Scope of Work" section of Annex A (Statement of Work).</li></ul> <p><b>If greater than two are submitted only the first two will be evaluated.</b></p> <p>(*A 'patent family' is defined as a set of patents that are linked by a common priority document and priority date.).</p>	<p>Complete the tables (Patent Family A and Patent Family B) below with all information demonstrating M1 met.</p>

Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
wpg113  
CCC No./N° CCC - FMS No./N° VME

**M1 Tables for completion by Offeror.**

Patent Family A					Bidder Response or Cross Reference to Page and Paragraph within Technical Offer Where M1 Demonstrated			
Title of the patent								
Countries, Reference Number and Date of issuance of the patents					Country	Patent Number	Date of issuance of patent	Cross Reference in Bid where Cover page of issued patent included
					Canada			
					United States of America			
					Country outside NA #1			
					Country outside NA #2			
Explain how the patent family falls into Category #4 – New Trends as defined in the “Scope of Work” section of Annex A (Statement of Work).								

Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
wpg113  
CCC No./N° CCC - FMS No./N° VME

Patent Family B	Bidder Response or Cross Reference to Page and Paragraph within Technical Offer Where M1 Demonstrated			
Title of the patent				
Countries, Reference Number and Date of issuance of the patents	Country	Patent Number	Date of issuance of patent	Cross Reference in Bid where Cover page of issued patent included
	Canada			
	United States of America			
	Country outside NA #1			
	Country outside NA #2			
Explain how the patent family falls into Category #4 – New Trends as defined in the “Scope of Work” section of Annex A (Statement of Work).				



Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
WPG113  
CCC No./N° CCC - FMS No./N° VME

## 2. MANDATORY TECHNICAL CRITERIA FOR SENIOR PATENT AGENT

### PATENT EDUCATION AND EXPERIENCE

Mandatory	Description	Offeror Must Include Following Information for Evaluation to Demonstrate	Bidder to Insert Information or Cross Reference in Technical Offer Where Demonstrated
M2	The Senior Patent Agent must be registered to practice with Canadian Intellectual Property Office (CIPO) for a minimum of five (5) years from date of RFSO closing *Bidder must provide a copy of the certificate	Name of Senior Patent Agent Certification Number and copy of certificate Date of registration with the Canadian Intellectual Property Office (CIPO)	
M3	The Senior Patent Agent must be registered with the US Patent Trademark Office for a minimum of five (5) years from date of RFSO closing *Bidder must provide a copy of the certificate	Name of Patent Agent Certification Number and provide a copy of certificate. Date of registration with the US Patent Trademark Office	

Solicitation No. - N° de l'invitation  
01R11-20S009/A  
Client Ref. No. - N° de réf. du client  
01R11-20S009

Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-9-42097

Buyer ID - Id de l'acheteur  
WPG113  
CCC No./N° CCC - FMS No./N° VME

**SCIENTIFIC EDUCATION AND RESEARCH EXPERIENCE**

Mandatory	Description	Offeror to Include Following Information for Evaluation	Bidder to Insert Information or Cross Reference in Technical Offer Where Demonstrated
M4	<p>The Senior Patent Agent must meet two (2) of the three (3) criteria listed below:</p> <ul style="list-style-type: none"><li>• Education - Bachelor of Science Degree in Computer Science, Information Technologies, Environmental Chemistry, or other field that is related to Category #4 – New Trends.</li><li>• Post graduate degree in one (1) of the above areas</li></ul> <p>Copies of diplomas must be provided.</p> <ul style="list-style-type: none"><li>• Minimum of two (2) years (24 months) cumulative research work experience - post-doctoral or other research experience related to the fields of Category #4 – New Trends.</li></ul>	<p>Bachelor degree obtained (specify the field)</p> <p>Copy of diploma to be provided.</p> <p>Post graduate degree obtained (specify the field)</p> <p>Copy of diploma to be provided.</p> <p>Dates and description of research work experience – post-doctoral or other research experience related to the fields of Category #4 – New Trends. *Bidder must demonstrate a cumulative experience of 2 years (24 months).</p>	<p>For each research work experience cited</p> <p>Date From (month year):</p> <p>Date To (month year):</p> <p>Field:</p> <p>Type (e.g. Post-doctoral, other)</p> <p>Description</p>

## 2. MANDATORY TECHNICAL CRITERIA FOR THE JUNIOR PATENT AGENT

### PATENT EDUCATION AND EXPERIENCE

Mandatory	Description	Offeror Must Include Following Information for Evaluation to Demonstrate	Bidder to Insert Information how Mandatory is Met in Table or Cross Reference in Technical Offer Where Demonstrated
M5	The Junior Patent Agent must be registered to practice with Canadian Intellectual Property Office (CIPO) for a minimum of two (2) years from date of RF-SO closing date.  *Bidder must provide a copy of the certificate	Name of Junior Patent Agent	
		Certification Number and copy of certificate	
		Date of registration as a patent agent in Canada	

### SCIENTIFIC EDUCATION

Mandatory	Description	Offeror to Include Following Information for Evaluation	Bidder to Insert Information or Cross Reference in Technical Offer Where Demonstrated
M6	The Junior Patent Agent must meet the criteria below: <ul style="list-style-type: none"><li>Education - Bachelor of Science Degree in Computer Science, Information Technologies, Environmental Chemistry, or other field that is related to Category #4 – New Trends.</li></ul> Bidder must provide a copy of the diploma.	Bachelor degree obtained (specify the field)  Copy of diploma	

Solicitation No. - N° de l'invitation 01R11-20S009/A	Amd. No. - N° de la modif.	Buyer ID - Id de l'acheteur
Client Ref. No. - N° de réf. du client 01R11-20S009	File No. - N° du dossier WPG-9-42097	WPG113
		CCC No./N° CCC - FMS No./N° VME

**ANNEX “J” to PART 3 OF THE REQUEST FOR STANDING OFFERS**

**ELECTRONIC PAYMENT INSTRUMENTS**

The Offeror accepts to be paid by any of the following Electronic Payment Instrument(s):

- ☐ ( ) VISA Acquisition Card;
- ☐ ( ) MasterCard Acquisition Card;
- ☐ ( ) Direct Deposit (Domestic and International);
- ☐ ( ) Electronic Data Interchange (EDI);
- ☐ ( ) Wire Transfer (International Only);

## ANNEX "K"

### STANDING OFFER USAGE REPORT

<b>Offeror (Supplier)</b>	
<b>Prepared by</b>	
<b>Telephone number</b>	
<b>Date</b>	
<b>Standing Offer #</b>	
<b>Department or Agency</b>	

**Return to:** Public Works and Government Services Canada  
Email: TPSCG.ROPAequipedesoutien-WRAPSupportTeam.PWGSC@tpsgc-pwgsc.gc.ca  
*The usage report must be submitted no later than fifteen (15) calendar days after the end of the reporting period.*

#### 1. REPORTING PERIOD

Year: \_\_\_\_\_

- ☐ 1st quarter: October 1 to December 31  
☐ 2nd quarter: January 1 to March 31

- ☐ 3rd quarter: April 1 to June 30  
☐ 4th quarter: July 1 to September 30

#### 2. REPORT DETAILS

Complete either A or B below, as applicable.

##### A. Nil Report

- ☐ We have not done any business with the federal government for this reporting period.

##### B. Itemized Report

Call-up	Call-up Number or Description	Value of the Call-Up (GST/HST Included)
1		\$
2		\$
3		\$
4		\$
5		\$
6		\$
7		\$
8		\$
9		\$
10		\$
(A) Total dollar value of call-ups for this reporting period		\$
(B) Accumulated call-up totals to date		\$
(A+B) Total accumulated call-ups		\$