

**REQUEST FOR PROPOSAL /  
DEMANDE DE PROPOSITION**

**RETURN BIDS TO /  
RETOURNER LES SOUMISSIONS À:**

By e-mail to: binh.duong@forces.gc.ca  
 Director Services Contracting (D Svcs C) 3-3-3  
 Att: Binh Duong

**Proposal To: National Defence Canada**

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

**Proposition à : Défense nationale Canada**

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens et services énumérés ici et sur toute feuille ci-annexée, au(x) prix indiqué(s).

<b>Title / Titre:</b> Generation of Cost-of-Living and Shelter Data for the Redesign and Maintenance of the Post-Living Differential Allowance Program		<b>Solicitation No / No de l'invitation:</b>  W6369-20-A052/A
<b>Date of Solicitation / Date de l'invitation:</b> 30 December 2020		
<b>Address Enquiries to – Adresser toutes questions à:</b> Binh Duong Director Services Contracting (D Svc C) 3-3-3 101 Colonel By Drive Ottawa, Ontario K1A 0K2  binh.duong@forces.gc.ca		
<b>Telephone No. / N° de téléphone:</b> 819-939-8539		<b>FAX No / No de fax:</b>
<b>Destination:</b> See Herein		

**Instructions:**

**Municipal taxes are not applicable. Unless otherwise specified herein all prices quoted must include all applicable Canadian customs duties, GST/HST, excise taxes and are to be delivered Delivery Duty Paid including all delivery charges to destination(s) as indicated. The amount of the Goods and Services Tax/Harmonized Sales Tax is to be shown as a separate item.**

**Instructions:**

**Les taxes municipales ne s'appliquent pas. Sauf indication contraire, les prix indiqués doivent comprendre les droits de douane canadiens, la TPS/TVH et la taxe d'accise. Les biens doivent être livrés «rendu droits acquittés», tous frais de livraison compris, à la ou aux destinations indiquées. Le montant de la taxe sur les produits et services/taxe de vente**

<b>Solicitation Closes / L'invitation prend fin:</b>  At / à : 2:00 PM Eastern Standard Time (EST)
          On / le : 29 January 2021

<b>Delivery required / Livraison exigée:</b>	<b>Delivery offered / Livraison proposée:</b>
<b>Vendor Name and Address / Raison sociale et adresse du fournisseur:</b>	
<b>Name and title of person authorized to sign on behalf of vendor (type or print) / Nom et titre de la personne autorisée à signer au nom du fournisseur (caractère d'imprimerie):</b>	
<b>Name / Nom:</b> _____	<b>Title / Titre:</b> _____
<b>Signature:</b> _____	<b>Date:</b> _____



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### **REISSUE OF BID SOLICITATION**

This bid solicitation cancels and supersedes previous bid solicitation number, W6369-20-A052 dated 13 August 2020 with a closing of 2 September 2020 at 2:00PM (EDT). A debriefing or feedback session will be provided upon request to bidders/offerors/suppliers who bid on the previous solicitation.



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## **PART 1 - GENERAL INFORMATION**

### **1.1 Introduction**

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

- Part 1 General Information: provides a general description of the requirement;
  - Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
  - Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
  - Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
  - Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
  - Part 6 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.
- B. The Attachments include the Pricing Schedule, the Technical Criteria, and Additional Certifications Precedent to Contract Award.
- C. The Annexes include the Statement of Work, the Basis of Payment, and the Non-Disclosure Agreement.

### **1.2 Summary**

- A. The Department of National Defence (DND) has a requirement for the following:
- i. Provide a comprehensive cost-of-living model and methodology inclusive of cost-of-living surveys;
  - ii. Deliver an integrated comprehensive package of reports called the “Canadian Department of National Defence PLD Survey Methodology Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A; and
  - iii. Deliver a comprehensive package of reports called the “Canadian Department of National Defence Separation Expense (SE) Survey Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A.

The intent of this solicitation is to establish up to one (1) contract for one (1) year, plus four (4) additional one-year irrevocable options allowing Canada to extend the term of the contract.

- B. The requirement is subject to the provisions of the Canadian Free Trade Agreement (CFTA).



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### **1.3 Debriefings**

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



## PART 2 - BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

- A. All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions (SACC) Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- B. Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.
- C. The 2003 (2020-05-28), Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation, with the following modification(s):
- (i) Section 02, Procurement Business Number, is deleted in its entirety;
  - (ii) Section 05, Submission of bids, subsection 2, paragraph d., is deleted in its entirety and replaced with the following:
    - d. send its bid only to the Department of National Defence location specified on page 1 of the bid solicitation or to the address specified in the bid solicitation.
  - (iii) Section 05, Submission of bids, subsection 2, paragraph e., is deleted in its entirety and replaced with the following:
    - e. ensure that the Bidder's name, return address, the bid solicitation number, and bid solicitation closing date and time are clearly visible on the bid; and
  - (iv) Section 05, Submission of bids, subsection 4, is amended as follows:
    - Delete: 60 days
    - Insert: 90 days
  - (v) Section 06, Late bids, is deleted in its entirety;
  - (vi) Section 07, Delayed bids, is deleted in its entirety and replaced with the following:
    - 07 Delayed bids
    - 1. It is the Bidder's responsibility to ensure that the Contracting Authority has received the entire submission. Misrouting or other electronic delivery issues resulting in late submission of bids will not be accepted.
  - (vii) Section 08, Transmission by facsimile, is deleted in its entirety; and
  - (viii) Section 20, Further information, is deleted in its entirety.

#### 2.1.1 SACC Manual Clauses



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[A7035T](#) (2007-05-25), List of Proposed Subcontractors

## 2.2 Submission of Bids

- A. Bids must be submitted only to the Department of National Defence (DND) by the date, time, and place indicated on page 1 of the bid solicitation.
- B. Due to the nature of the bid solicitation, bids transmitted by facsimile will not be accepted.

### 2.2.1 Electronic Submissions

Individual e-mails that may include certain scripts, formats, embedded macros and/or links, or those that exceed **five (5) megabytes** may be rejected by Canada's e-mail system and/or firewall(s) without notice to the Bidder or Contracting Authority. Larger bids may be submitted through more than one e-mail. Canada will confirm receipt of documents. It is the Bidder's responsibility to ensure that their entire submission has been received. Bidders should not assume that all documents have been received unless Canada confirms receipt of each document. In order to minimize the potential for technical issues, bidders are requested to allow sufficient time before the closing date and time to confirm receipt. Bid documents submitted after the closing time and date will not be accepted.

## 2.3 Former Public Servant

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

### 2.3.1 Definitions

For the purposes of this clause:

- (i) "Former public servant" is any former member of a department as defined in the [Financial Administration Act](#), R.S., 1985, c. F-11 (<http://laws-lois.justice.gc.ca/eng/acts/F-11/FullText.html>), 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;
- (ii) "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; and

- (iii) "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.

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

A. As per the above definitions, is the Bidder a FPS in receipt of a pension?

Yes ( ) No ( )

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

- (i) Name of former public servant; and
- (ii) Date of termination of employment or retirement from the Public Service.

C. By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2012-2](#) (<http://www.tbs-sct.gc.ca/hgw-cgf/business-affaire/gcp-agc/notices-avis/2012/10-31-eng.asp>) and the [Guidelines on the Proactive Disclosure of Contracts](#) (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=14676>).

### 2.3.3 Work Force Adjustment Directive

A. Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive?

Yes ( ) No ( )

B. If so, the Bidder must provide the following information:

- (i) Name of former public servant;
- (ii) Conditions of the lump sum payment incentive;
- (iii) Date of termination of employment;
- (iv) Amount of lump sum payment;
- (v) Rate of pay on which lump sum payment is based;



- (vi) Period of lump sum payment including start date, end date and number of weeks; and
  - (vii) Number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.
- C. 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 - Bid Solicitation**

- A. All enquiries must be submitted in writing to the Contracting Authority no later than five (5) calendar days before the bid closing date. Enquiries received after that time may not be answered.
- B. Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

**2.5 Applicable Laws**

- A. Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.
- B. Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.

**2.6 Basis for Canada's Ownership of Intellectual Property**

DND 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](http://www.ic.gc.ca/eic/site/068.nsf/eng/00005.html) (<http://www.ic.gc.ca/eic/site/068.nsf/eng/00005.html>):

- The main purpose of the Contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.



### **PART 3 - BID PREPARATION INSTRUCTIONS**

#### **3.1 Bid Preparation Instructions**

- A. Canada requests that Bidders provide their bid in separately bound sections as follows:
  - Section I: Technical Bid: one (1) soft copy in PDF format by e-mail;
  - Section II: Financial Bid: one (1) soft copy in PDF format by e-mail;
  - Section III: Certifications: one (1) soft copy in PDF format by e-mail; and
  - Section IV: Additional Information: one (1) soft copy in PDF format by e-mail.
- B. Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.

#### **3.2 Section I: Technical Bid**

- A. In their technical bid, Bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.
- B. The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that Bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, Bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.
- C. The Bidder must provide customer references. The customer reference must each confirm, if requested by DND, the facts identified in the Bidder's bid, as required by Attachment 1 to Part 4;

The form of question to be used to request confirmation from customer references is as follows:

[Sample Question to Customer Reference: "Has [the Bidder] provided your organization with [call the services and, if applicable, describe any required time frame within which those services must have been provided]?"

- Yes, the Bidder has provided my organization with the services described above.
- No, the Bidder has not provided my organization with the services described above.
- I am unwilling or unable to provide any information about the services described above.

For each customer reference, the Bidder must, at a minimum, provide the name and e-mail address for a contact person. If only the telephone number is provided, it will be used to call to request the e-mail address and the reference check will be done by e-mail.

Bidders are also requested to include the title of the contact person. It is the sole responsibility of the Bidder to ensure that it provides a contact who is knowledgeable about the services the



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Bidder has provided to its customer and who is willing to act as a customer reference. Crown references will be accepted.

### **3.3 Section II: Financial Bid**

- A. Bidders must submit their financial bid in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3.

#### **3.3.1 Electronic Payment of Invoices - Bid**

- A. If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Attachment 2 to Part 3, Electronic Payment Instruments, to identify which ones are accepted.
- B. If Attachment 2 to Part 3, Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices.
- C. Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

#### **3.3.2 Exchange Rate Fluctuation**

The requirement does not offer exchange rate fluctuation risk mitigation. Requests for exchange rate fluctuation risk mitigation will not be considered. All bids including such provision will render the bid non-responsive.

### **3.4 Section III: Certifications**

Bidders must submit the certifications and additional information required under Part 5.

### **3.5 Section IV: Additional Information**

In Section IV of their bid, bidders should provide:

- (i) A completed, signed, and dated Page 1 of this solicitation;
- (ii) The name of the contact person (provide also this person's title, mailing address, phone number, and email address) authorized by the Bidder to enter into communications with Canada with regards to their bid, and any contract that may result from their bid;
- (iii) For Part 2, article 2.3, Former Public Servant, of the bid solicitation: the required answer to each question; and, if the answer is yes, the required information;
- (iv) For Part 2, article 2.5, Applicable Laws, of the bid solicitation: the province or territory if different than specified;
- (v) Any other information submitted in the bid not already detailed.



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**ATTACHMENT 1 TO PART 3 - PRICING SCHEDULE**

- A. The Bidder must complete this pricing schedule and include it in its financial bid.
- C. The firm all-inclusive rates specified below include all expenses that may need to be incurred to satisfy the terms of any contract that may result from its bid, including the total estimated cost of any travel and living expenses that may need to be incurred for the Work described in Annex A, Statement of Work of the bid solicitation.
- D. Under any resulting contract, Canada will not accept travel and living expenses that may need to be incurred by the contractor for any relocation of resources required to satisfy its contractual obligations.
- E. All prices and costs must be submitted in Canadian Dollars, Applicable Taxes excluded, FOB destination, freight charges included, Canadian customs duties and excise taxes included.

Description	Firm All-Inclusive Rate (Can \$)
<b>Initial Period Year 1: From the date of contract to one year later</b>	
Delivery and acceptance of the April 2020 PLD calculations, including an integrated comprehensive package of reports called the “Canadian Department of National Defence PLD Survey Methodology Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A;	\$ _____
Delivery and acceptance of the April 2019 SE Report, including a comprehensive package of reports called the “Canadian Department of National Defence Separation Expense (SE) Survey Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A.	\$ _____
Delivery and acceptance of the April 2020 SE Report, including a comprehensive package of reports called the “Canadian Department of National Defence Separation Expense (SE) Survey Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A.	\$ _____
<b>Option Period 1 (if exercised): From end of Initial Period Year 1 to one year later</b>	
Delivery and acceptance of the April 2021 PLD calculations, including an integrated comprehensive package of reports called the “Canadian Department of National Defence PLD Survey Methodology Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A;	\$ _____
<b>Option Period 2 (if exercised): From end of Option Period 1 to one year later</b>	
Delivery and acceptance of the April 2022 PLD calculations, including an integrated comprehensive package of reports called the “Canadian Department of National Defence PLD Survey Methodology Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A;	\$ _____



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<b>Option Period 3 (if exercised): From end of Option Period 2 to one year later</b>	
Delivery and acceptance of the April 2023 PLD calculations, including an integrated comprehensive package of reports called the “Canadian Department of National Defence PLD Survey Methodology Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A;	\$ _____
<b>Option Period 4 (if exercised): From end of Option Period 3 to one year later</b>	
Delivery and acceptance of the April 2024 PLD calculations, including an integrated comprehensive package of reports called the “Canadian Department of National Defence PLD Survey Methodology Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A;	\$ _____
<b>Total Evaluated Price, Inclusive of All Periods (Applicable Taxes Excluded)</b>	\$ _____
<b>Applicable Taxes</b>	\$ _____
<b>Total</b>	\$ _____



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### **ATTACHMENT 2 TO PART 3 - ELECTRONIC PAYMENT INSTRUMENTS**

The Bidder 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); and
- Wire Transfer (International Only).



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## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

- A. Bids will be assessed in accordance with the entire requirement of the bid solicitation.
- B. An evaluation team composed of representatives of Canada will evaluate the bids.

#### 4.1.1 Technical Evaluation

- A. Mandatory technical evaluation criteria are included in Attachment 1 to Part 4, Evaluation Criteria.
- B. **Reference Checks:** If Canada decides to conduct reference checks on any given rated or mandatory criteria, the following procedure will be used:
  - (i) For reference checks, Canada will conduct the reference check in writing by email. Canada will send all email reference check requests to contacts supplied by all the Bidders within a 48-hour period using the email address provided in the bid. Bidder will not meet the mandatory experience requirement (as applicable) unless the response is received within 5 working days of the date that Canada's email was sent.
  - (ii) On the third working day after sending out the reference check request, if Canada has not received a response, Canada will notify the Bidder by email, to allow the Bidder to contact its Customer Reference directly to ensure that it responds to Canada within 5 working days. If the individual named by a Bidder is unavailable when required during the evaluation period, the Bidder may provide the name and email address of an alternate contact person from the same Customer Reference. The Bidders will only be provided with this opportunity once for each Customer Reference, and only if the originally named individual is unavailable to respond (i.e., the Bidder will not be provided with an opportunity to submit the name of an alternate contact person if the original contact person indicates that he or she is unwilling or unable to respond). The Bidder will have 1 working day to submit the name of a new contact. That contact will again be given 5 working days to respond once Canada sends its Customer Reference check request.
  - (iii) Wherever information provided by a Customer Reference differs from the information supplied by the Bidder, the information supplied by the Customer Reference will be the information evaluated.
  - (iv) Bidder will not meet the mandatory experience requirement (as applicable) if (1) the Customer Reference states he or she is unable or unwilling to provide the information requested, or (2) the Customer Reference is not a customer of the Bidder itself (for example, the Customer Reference cannot be the customer of an affiliate of the Bidder instead of being a customer of the Bidder itself). Nor will a mandatory met if the Customer Reference is itself an affiliate or other entity that does not deal at arm's length with the Bidder.
  - (v) Whether or not to conduct reference checks is discretionary. However, if DND chooses to conduct reference checks for any given mandatory requirement, it will check the Customer References for that requirement for all bidders who have not, at that point, been found non-responsive.





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#### **4.1.2 Financial Evaluation**

The price of the bid will be evaluated in Canadian dollars, Applicable Taxes excluded, FOB destination, freight charges included, Canadian customs duties and excise taxes included.

#### **4.2 Basis of Selection - Lowest Evaluated Price, Mandatory Technical Criteria**

- A. A bid must comply with the requirements of the bid solicitation and meet all mandatory technical evaluation criteria to be declared responsive. The responsive bid with the lowest evaluated price will be recommended for award of a contract.
- B. Should two (2) or more responsive bids achieve an identical lowest evaluated price, the bid with the highest level of experience in mandatory technical criterion MT2 will be recommended for award of a contract.



**ATTACHMENT 1 TO PART 4 - EVALUATION CRITERIA**

**Mandatory Technical Criteria**

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.

Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

<b>Mandatory Technical Criteria (MT)</b>		
For the purpose of the mandatory technical criteria specified below, the experience of the Bidder and its subcontractors will be considered.		
<b>Number</b>	<b>Mandatory Technical Criterion</b>	<b>Bid Preparation Instructions</b>
<b>MT1</b>	<p>The Bidder must propose a Team Leader/ Lead Statistician assigned throughout the duration of the project.</p> <p>The Team Leader/Lead Statistician must have a</p> <p>(a) University degree obtained from a recognized* Canadian university, or the equivalent as established by a recognized* Canadian academic credentials assessment service, if obtained outside Canada, in the discipline of Statistics/Mathematics/ Economics / Computational/Actuarial Sciences</p> <p>and</p> <p>(b) ten (10) years of experience in conducting Cost of Living survey.</p> <p>*The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following Internet link: <a href="http://www.cicic.ca/indexe.stm">http://www.cicic.ca/indexe.stm</a></p>	<p>(a) The Bidder must provide a detailed resume with project descriptions of the proposed Team Leader / Lead Statistician and proof of university degree. Canada may, at any time, request a copy of the degree or diploma to verify the information, if it is not provided with the bid.</p> <p>(b) At a minimum, the following must be provided:</p> <ul style="list-style-type: none"> <li>• Name and description of client organization;</li> <li>• Timeframe (from-to dates month/year);</li> <li>• Description of the roles and responsibilities; and</li> <li>• Reference (Name, phone number and email address) for each project.</li> </ul>
<b>MT2</b>	<p>The Bidder must demonstrate a minimum of one hundred and twenty (120) months of experience within the last one hundred and eighty (180) months conducting in depth human resources research related to cost-of-living programs.</p>	<p>At a minimum, the following must be provided:</p> <ul style="list-style-type: none"> <li>• Name and description of client organization;</li> <li>• Timeframe (from-to dates month/year);</li> <li>• Description of the roles and responsibilities; and</li> <li>• Reference (Name, phone number</li> </ul>



		and email address) for each project.
<b>MT3</b>	The Bidder must demonstrate ability to harvest within three (3) months of Contract Award, the required data to prepare the reports as listed in the SOW.	This must be demonstrated by providing a sample of data of sufficient size, listing at least 25 major Canadian cities, with a clear demonstration of the depth of data in each location. Depth of data means a minimum of 8 Cost-of-Living/Basket-of-Goods categories, such as: rental housing, owned housing, food, entertainment, clothing, vehicle maintenance, fuel, housing utilities, housing insurance, childcare, etc. For further clarity bidders can refer to categories used in the Basket-of-Goods for the Consumer Price Index found on <a href="http://www.statscan.ca">www.statscan.ca</a> .
<b>MT4</b>	The Bidder must be able to sever their data and manipulate it to achieve the different reports as listed in the SOW.  This means they must be able to alter the weighting of their calculations that generate cost-of-living profiles for locations in a logical way that is consistent with current economic theory/practice.	This must be demonstrated by providing one sample of a cost-of-living report for one location and one sample of a cost-of-living report for the same location with one element removed (e.g. homeownership) and others re-weighted to provide a revised cost-of-living profile. The difference in weighting within the calculations must be shown in a way that it can be examined by the bid evaluator. For example, if “housing” is a weighted aggregate of rental and owned housing, the bidder must be able to remove one of the two types of housing and re-weight the price appropriately.
<b>MT5</b>	The Bidder must demonstrate that they hold an existing data pool containing cost-of-living data for 50 or more Canadian locations, collected within the past three (3) years.	At a minimum, the following must be provided: <ul style="list-style-type: none"> <li>• A sample showing cost-of-living data for 50 locations</li> <li>• A survey outline indicating their ability to collect any required data not held.</li> </ul> A sample of the average cost of living in a location with the identification of industrial activity impacting the market data (e.g. oil sands activity drive rents)



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## **PART 5 - CERTIFICATIONS AND ADDITIONAL INFORMATION**

- A. Bidders must provide the required certifications and additional information to be awarded a contract.
- B. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.
- C. The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

### **5.1 Certifications Required with the Bid**

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

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

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

### **5.2 Certifications Precedent to Contract Award and Additional Information**

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

#### **5.2.1 Integrity Provisions - Required Documentation**

In accordance with the section titled "Information to be provided when bidding, contracting, or entering into a real procurement 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 Bidder 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 - Bid Certification**

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



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- B. Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the “FCP Limited Eligibility to Bid” list at the time of contract award.

### **5.2.3 Status and Availability of Resources**

- A. The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.
- B. If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

### **5.2.4 Education and Experience**

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

### **5.2.5 Certification of Language – English Essential**

By submitting a bid, the Bidder certifies that, should it be awarded a contract as result of the bid solicitation, the individual proposed in its bid will be fluent in English. The individual proposed must be able to communicate orally and in writing in English without any assistance and with minimal errors.



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## **PART 6 - RESULTING CONTRACT CLAUSES**

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

### **6.1 Statement of Work**

The Contractor must perform the Work in accordance with the Statement of Work at Annex A.

#### **6.1.1 Optional Goods and/or Services**

- A. The Contractor grants to Canada the irrevocable option to acquire the goods, services, or both described at Annex A, Statement of Work, of the Contract under the same conditions and at the prices and/or rates stated in the Contract. The option may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment.
- B. The Contracting Authority may exercise the option at any time before the expiry of the Contract by sending a written notice to the Contractor.

### **6.2 Standard Clauses and Conditions**

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

#### **6.2.1 General Conditions**

2035 (2018-06-21), General Conditions - Higher Complexity - Services, apply to and form part of the Contract, with the following modification:

- (i) Article 01, Interpretation, "Canada", "Crown", "Her Majesty" or "the Government", is deleted in its entirety and replaced with the following:

"Canada", "Crown", "Her Majesty" or "the Government"  
means Her Majesty the Queen in right of Canada as represented by the Minister of National Defence and any other person duly authorized to act on behalf of that minister or, if applicable, an appropriate minister to whom the Minister of National Defence has delegated his or her powers, duties or functions and any other person duly authorized to act on behalf of that minister.

#### **6.2.2 Specific Person**

The Contractor must provide the services of the following person to perform the Work as stated in the Contract: **[name(s) of person(s) to be inserted in the resulting contract]**.

### **6.3 Security Requirements**

There is no security requirement applicable to the Contract.

### **6.4 Term of Contract**



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**6.4.1 Period of the Contract**

A. The period of the Contract is from date of Contract to [date to be inserted at contract award] inclusive.

**6.4.2 Option to Extend the Contract**

- A. The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to four(4) additional one (1) year period(s) under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.
- B. Canada may exercise this option at any time by sending a written notice to the Contractor at least thirty (30) calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

**6.5 Authorities**

**6.5.1 Contracting Authority**

A. The Contracting Authority for the Contract is:

[Contact information to be detailed in the resulting contract]

Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Organization: \_\_\_\_\_  
 Address: Department of National Defence  
 101 Colonel By Drive  
 Ottawa ON K1A 0K2  
 Telephone: \_\_\_\_\_  
 E-mail: \_\_\_\_\_

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

**6.5.2 Technical Authority**

A. The Technical Authority for the Contract is:

[Contact information to be detailed in the resulting contract]

Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Organization: \_\_\_\_\_  
 Address: Department of National Defence (DND)  
 101 Colonel By Drive  
 Ottawa ON K1A 0K2  
 Telephone: \_\_\_\_\_  
 E-mail: \_\_\_\_\_



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

**6.5.3 Contractor's Representative**

[Contact information to be detailed in the resulting contract]

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

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

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

\_\_\_\_\_

\_\_\_\_\_

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

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

**6.6 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](http://laws-lois.justice.gc.ca/eng/acts/P-36/FullText.html) (PSSA) (<http://laws-lois.justice.gc.ca/eng/acts/P-36/FullText.html>) 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](http://www.tbs-sct.gc.ca/pubs_pol/dcgpubs/contpolnotices/siglist-eng.asp) of the Treasury Board Secretariat of Canada ([http://www.tbs-sct.gc.ca/pubs\\_pol/dcgpubs/contpolnotices/siglist-eng.asp](http://www.tbs-sct.gc.ca/pubs_pol/dcgpubs/contpolnotices/siglist-eng.asp)).

**6.7 Payment**

**6.7.1 Basis of Payment**

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price of \$[amount to be detailed in the resulting contract]. Customs duties are included and Applicable Taxes are extra.

**6.7.2 Limitation of Expenditure**

- A. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

(i) when it is 75% committed; or

(ii) four (4) months before the contract expiry date; or

(iii) as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work;





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whichever comes first.

- B. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

### 6.7.3 Method of Payment

Canada will pay the Contractor upon completion and delivery of the Work in accordance with the payment provisions of the Contract if:

- a. an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all such documents have been verified by Canada;
- c. the Work delivered has been accepted by Canada.

### 6.7.4 Electronic Payment of Invoices - Contract

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

**List to be updated in the resulting contract**

- (i) Visa Acquisition Card;
- (ii) MasterCard Acquisition Card;
- (iii) Direct Deposit (Domestic and International);
- (iv) Electronic Data Interchange (EDI); and
- (v) Wire Transfer (International Only); and

### 6.7.5 Discretionary Audit

C0705C (2010-01-11), Discretionary Audit

### 6.8 Invoicing Instructions

- A. 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.
- B. Each invoice must be supported by:
- (i) A copy of the release document and any other documents as specified in the Contract;
  - (i) A description of the Work delivered; and



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- (iii) A breakdown of the cost elements.

C. Invoices must be distributed as follows:

- (i) The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.
- (ii) One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

## 6.9 Certifications and Additional Information

### 6.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

### 6.9.2 Certifications - Contract

Compliance with the certifications provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the term of the Contract. If the Contractor does not comply with any certification or it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

## 6.10 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario **or as specified by the bidder in its bid, if applicable**.

## 6.11 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:

- (i) The Articles of Agreement;
- (ii) The General Conditions [2035](#) (2020-05-28), General Conditions - Higher Complexity - Services;
- (iii) Annex A, Statement of Work;
- (iv) Annex B, Basis of Payment;
- (v) Annex C, Non-Disclosure Agreement: and



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- (vi) the Contractor's bid dated [date to be specified in the resulting contract], as clarified on [date to be specified in the resulting contract, if required], and as amended on [date to be specified in the resulting contract, if required].

## 6.12 Defence Contract

- A. The Contract is a defence contract within the meaning of the *Defence Production Act*, R.S.C. 1985, c. D-1 (<http://laws-lois.justice.gc.ca/eng/acts/d-1/>), and must be governed accordingly.
- B. Title to the Work or to any materials, parts, work-in-process or finished work must belong to Canada free and clear of all claims, liens, attachments, charges or encumbrances. Canada is entitled, at any time, to remove, sell or dispose of the Work or any part of the Work in accordance with section 20 of the *Defence Production Act*.

One (1) of the following two (2) options will be inserted in the resulting contract, as applicable:

Option 1: A2000C (2006-06-16) when the contract is to be with a Canadian-based supplier; or

### 6.13 Foreign Nationals (Canadian Contractor)

The Contractor must comply with Canadian immigration requirements applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Contract. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Contract, the Contractor should immediately contact the nearest Service Canada regional office to enquire about Citizenship and Immigration Canada's requirements to issue a temporary work permit to a foreign national. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

Option 2: A2001C (2006-06-16) when the contract is to be with a foreign-based supplier.

### 6.13 Foreign Nationals (Foreign Contractor)

The Contractor must comply with Canadian immigration legislation applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Contract. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Contract, the Contractor should immediately contact the nearest Canadian Embassy, Consulate or High Commission in the Contractor's country to obtain instructions, information on Citizenship and Immigration Canada's requirements and any required documents. The Contractor is responsible to ensure that foreign nationals have the required information, documents and authorizations before performing any work under the Contract in Canada. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

## 6.14 Insurance

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

## 6.15 Non-Disclosure Agreement

The Contractor must obtain from its employee(s) or subcontractor(s) the completed and signed non-disclosure agreement, attached at Annex C, and provide it to the Contracting Authority



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before they are given access to information by or on behalf of Canada in connection with the Work.

## **6.16 Intellectual Property**

### 6.15.1 Interpretation

"Background Information" means all Intellectual Property that is not Foreground Information that is incorporated into the Work or necessary for the performance of the Work and that is proprietary to or the confidential information of the Contractor, its subcontractors or any other third party.

"Foreground Information" means all Intellectual Property first conceived, developed, produced or reduced to practice as part of the Work under the Contract.

"Intellectual Property" means any information or knowledge of an industrial, scientific, technical, commercial, literary, dramatic, artistic or otherwise creative nature relating to the Work.

"Work", unless otherwise expressed in the contracts mean, everything that is necessary to be done, furnished or delivered by the Contractor to perform the Contractor's obligations under the contract.

6.15.2 All Intellectual Property Rights in the Foreground Information belong to the Contractor as soon as they come into existence. The Contractor must provide a detailed record in writing of the Foreground and Background Information.

6.15.3 Contractor grants to Canada a license to exercise all Intellectual Property rights in the Foreground Information for Canada's activities. The Contractor also grants to Canada a license to use the Background Information to the extent that it is reasonably necessary for Canada to exercise fully all its rights in the deliverables and in the Foreground Information. The licenses are non-exclusive, perpetual, irrevocable, worldwide, fully-paid and royalty-free and include the right to disclose the Foreground Information or Background Information to third parties in a procurement process and to sublicense the use of the information by any contractor engaged by Canada solely for the purpose of carrying out any resulting contracts.

6.15.4 The Contractor warrants that the Work, to the best of the Contractor's knowledge, will not infringe the intellectual property rights of any third party. However, if such infringement does arise, the Contractor agrees to indemnify Canada and shall hold Canada harmless against and from any and all intellectual property claims of third parties relating to the Foreground Information or Background Information. Further, the Contractor represents and warrants that it has the right to grant to Canada the licenses and any other rights to use the Foreground Information and Background Information as set out in 6.15.3.

6.15.5 If requested by Canada, the Contractor must provide a written permanent waiver of moral rights, as defined in the Copyright Act, R.S., 1985, c. C-42, from every author that contributes to any Foreground Information subject to copyright protection that is a deliverable to Canada under the Contract. If the Contractor is an author of the Foreground Information, the Contractor permanently waives the Contractor's moral rights in that Foreground Information.

6.15.6 Any information supplied by Canada to the Contractor for the performance of the Work remains the property of Canada. The Contractor must use Canada's information only to perform the Contract. The Contractor must obtain a license from Canada for any other use.



**ANNEX A - STATEMENT OF WORK**

**GENERATION OF COST-LIVING AND SHELTER DATA FOR THE REDESIGN AND MAINTENANCE OF POST-LIVING-DIFFERENTIAL ALLOWANCE PROGRAM**

**1. SCOPE**

**1.1 Purpose**

The Department of National Defence has a requirement for the following:

- 1.1.1 Provide a comprehensive cost-of-living model and methodology inclusive of cost-of-living surveys;
- 1.1.2 Deliver an integrated comprehensive package of reports called the “Canadian Department of National Defence PLD Survey Methodology Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A; and
- 1.1.3 Deliver a comprehensive package of reports called the “Canadian Department of National Defence Separation Expense (SE) Survey Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A.

**1.2 Background**

In June 2000, the Treasury Board of Canada approved a cost-of-living allowance for the Canadian Armed Forces (CAF) called Post-Living-Differential (PLD). This allowance has exceeded the cost-of-living of the National Capital Region (NCR). Fiscal year surveys are now required for 2016, 2017, 2018, 2019 and future years as they occur.

In February 2011, the Treasury Board of Canada approved the Maximum Monthly Lodging Rates (in dollars) for CAF members entitled to Separation Expense (SE) and staying in non-commercial accommodations. Fiscal year surveys are now required for non-commercial accommodations for 2016, 2017, 2018, 2019 and future years as they occur.

**1.3 List of Acronyms and Abbreviations**

<b>Abbreviation</b>	<b>Description</b>
CAF	Canadian Armed Forces
DND	Department of National Defence
SOW	Statement of Work
SE	Separation Expense
PLD	Post-Living-Differential
CPI	Consumer Price Index



Abbreviation	Description
FAMEX	FAMEX is the cost-of-living profile for a CAF family as defined in the CAF Family Model provided.

**2. APPLICABLE DOCUMENTS**

**2.1 References**

The following reference is provided for the Request for Proposal. Where mentioned, the following Guidance must be used for the preparation of deliverables:

Compensation and Benefits Instructions for the Canadian Armed Forces

Reference	Date	Reference Title
<a href="https://www.canada.ca/en/department-national-defence/corporate/policies-standards/compensation-benefits-instructions/chapter-205-allowances-for-officers-and-non-commissioned-members.html#sec-45">https://www.canada.ca/en/department-national-defence/corporate/policies-standards/compensation-benefits-instructions/chapter-205-allowances-for-officers-and-non-commissioned-members.html#sec-45</a>	2009	CBI 205.45 Post-Living-Differential Allowance

**2.2 Order of Precedence**

In the event of a conflict between the content in this SOW and the referenced documents, the content of the SOW document takes precedence.

**3.0 GENERAL REQUIREMENTS**

**3.1 Scope of Work**

3.1.1 The Contractor must produce several data sets, derived from Canadian economic data. The data must be produced using a compensation and benefits lens to ensure it can be applied to HR programs.

3.1.2 The Contractor must perform the following:

3.1.2.1 Generate cost-of-living surveys for CAF locations (Appendix 3 and 4) based on:

3.1.2.1.1 Cost-of-living envelope (mimicking the CPI, but specific to the CAF Family Profiles (Appendix 1). The data collected and representative items priced will provide sufficient indication of spatial differences in expenditure by the representative household in the following components:

- a) Shelter, both rental and homeownership
- b) Goods and services;



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- c) Transportation; and
- d) Taxation.

3.1.2.1.2 Generate surveys for CAF locations (Appendix 3) that provides the average cost of a furnished non-commercial accommodation that contains no more than one-bedroom, bathroom, living room and kitchen. In CAF locations where there are no furnished rental accommodations, rental rates for unfurnished non-commercial accommodations that contain no more than one-bedroom, bathroom, living room and kitchen are to be provided. Where market data is skewed due to industrial activity, ensure that this is identified (e.g. oil sands activity drive rents).

## 4.0 TASKS AND REPORTS

### 4.1 The Contractor's tasks include:

The Contractor must provide Canadian Department of National Defence Post-Living-Differential (PLD) Survey Methodology Reports using comprehensive cost-of-living, and cost-of-housing models and based on the scope of Section 3.0 above, of this requirement. These reports must use a lens that allows the data to be used for HR program development. These reports include:

- a) Total Annual Cost (Renter, Owner and Aggregate profiles): These reports will provide the shelter costs for each CAF location;
- b) Total Cost of Living other than Shelter: This report includes components for taxation (income and sales taxes); transportation, based on a two-car family scenario; and goods and services, based on the latest FAMEX parameters for a family unit within the provided parameters;
- c) PLD Calculation: this report is to provide two summary table sets, one of all the various living costs for the various locations surveyed; the other detailing only shelter costs for the same locations. It will also show the allowance rates based on a comparison between CAF locations and the Standard City, which is calculated as an aggregate of the 100 largest Canadian municipalities; and
- d) An aggregated average "Standard City" value that can be compared against the locations surveyed. There must be a Standard City value for cost-of-living and for cost-of-housing (renter, owner and aggregate) provided.

### 4.2 SE Survey Reports

The Contractor must provide Canadian Department of National Defence SE Survey Reports reflecting the average annual rental cost of a furnished non-commercial accommodation. For locations where there are no rental furnished non-commercial accommodations available, the reports must include:

- a) The rental cost of an unfurnished non-commercial accommodation; and



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- b) The furniture rental cost broken down by item, as reflected in the attached itemized list (Appendix 2).

## 5 DELIVERABLES

The contractor, based on the Tasks at Section 4 above, must provide the following deliverables to the Department of National Defence (DND) Technical Authority (TA):

### 5.1 PLD Reports

#### i. Initial Contract Period

In support of the April 2020 PLD calculations, the 'Canadian Department of National Defence PLD Survey Methodology' final report' to be delivered no later than 120 days after Contract Award. This will comprise data from 2016, 2017, 2018, 2019 and 2020.

#### ii. Option Periods

In each respective option period the contractor must provide to the Department of National Defence (DND) Technical Authority (TA):

- In support of the April 2021 PLD calculations, the 'Canadian Department of National Defence PLD Survey Methodology' final report' to be delivered no later than 31 March 2021 or as soon as possible. This will comprise data from 2017, 2018, 2019, 2020 and 2021.
- In support of the April 2022 PLD calculations, the 'Canadian Department of National Defence PLD Survey Methodology' final report' to be delivered no later than 1 February 2022. This will comprise data from 2018, 2019, 2020, 2021 and 2022.
- In support of the April 2023 PLD calculations, the 'Canadian Department of National Defence PLD Survey Methodology' final report' to be delivered no later than 1 February 2023. This will comprise data from 2019, 2020, 2021, 2022 and 2023.
- In support of the April 2024 PLD calculations, the 'Canadian Department of National Defence PLD Survey Methodology' final report' to be delivered no later than 1 February 2024. This will comprise data from 2020, 2021, 2022, 2023 and 2024.

### 5.2 SE Reports

#### i. Initial Contract Period

- In support of the April 2019 SE Report, the 'Canadian Department of National Defence SE Survey final report to be delivered no later than 120 days after Contract Award. This will comprise data from 2016, 2017, 2018 and 2019.
- In support of the April 2020 SE Report, the 'Canadian Department of National Defence SE Survey final report to be delivered no later than 31 March 2021 or as soon as possible. This will comprise data from 2017, 2018 and 2019 and 2020.





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5.3 The Contractor must, on an annual basis, provide a copy of all raw material including pricing, costing data and cost-of-living reports in MS Excel format to the DND TA. This need not include anything that would identify the contractor's methodology in preparing the calculated components used for the calculation.

5.4 The Contractor must provide a complete copy of all data used in the reports in MS Excel format with formulas active to allow for automatic recalculation if categories are added or removed.

5.5 All reports will be delivered in electronic format via e-mail to the DND Technical Authority.

## **6.0 DND SUPPORT TO CONTRACTOR**

6.1 DND will provide technical advice on the requirements for calculation as requested by the Contractor.

6.2 In addition to the reference identified in Section 2, DND will provide the Contractor, either electronically or in hard copy format, with any required documents to perform the tasks listed in the SOW. Documents produced by Canada are subject to Crown copyright and cannot be reproduced without the express written permission of DND.

6.3 The Contractor must secure the documents from unauthorized use and shall not release or disclose the documents or their contents to any third party, person or agency external to DND without the express written permission of DND. The documents shall be returned to DND upon completion of the work or as requested by DND.

## **7.0 LANGUAGE REQUIREMENTS**

The resource must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.

## **8.0 TRAVEL REQUIREMENTS**

Canada will not reimburse any travel expenses related to this work requirement.

## **9.0 INSPECTION AND ACCEPTANCE**

9.1 All reports shall be subject to inspection by the DND TA, within reasonable timelines, on the basis of: suitability, quality and adherence to the SOW.

9.2 Should any report or part of a report prove unsatisfactory to the TA or non-compliant with the SOW, the TA has the right to reject the work and require its correction and resubmission within ten (10) business days of request.

9.3 Any communication with a Contractor regarding the quality of work performed pursuant to this Contract must be undertaken by official correspondence through the Contracting Authority.



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## APPENDIX 1: LIVING COST DATA

### Canadian Armed Forces (CAF) Family Profile – For Use in Calculating CAF Cost of Living Values

1. The First CAF Standard Family Profile is composed of:

- a. One full-time, Regular Force, CAF Sergeant who earns (gross): \$71,940/year;
- b. One part-time, military spouse who earns \$10,000/year;
- c. Two point three (2.3) children of school age; and
- d. Two vehicles of common make (mini-van, light truck, SUV, car) of makes affordable based on the above income.

2. The CAF Standard Family Profile is composed of:

- a. One full-time, Regular Force, CAF Corporal who earns (gross): \$63,624/year;
- b. One part-time, military spouse who earns \$10,000/year;
- c. Two point three (2.3) children of school age; and
- d. One vehicle of common make (mini-van, light truck, SUV, car) of makes affordable based on The above income.



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## APPENDIX 2: FURNITURE RENTAL SCALE

<b>Living Room</b>	<b>Authorized Quantity</b>
Sofa – 2 or 3 seat	1
Easy chair	1
Coffee table	1
End table	2
Table lamp	2
Television (32 inch)	1
TV stand	1

<b>Dining Room/Kitchen</b>	
Dining table	1
Chair	4
Microwave oven	1
Refrigerator	1
Electric Range/oven	1

<b>Bedroom</b>	
Headboard (Double)	1
Bedframe (Double)	1
Box Spring (Double)	1
Mattress (Double)	1
Night table	2
Dresser	1
Table lamp	1



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### APPENDIX 3: COST-OF-LIVING SURVEYS SAMPLE

Canadian Department of  
National Defence

Living Cost Data

Base Date: 12/2016

\$67,656 Family of 3 Renter

Report Currency: Canadian  
Dollar

	STANDARD CITY S Area Pr	CALGARY CMP AB
Income Tax	10990	9670
First Car	7938	6980
Second Car	3151	2194
Annual Rent	17640	17610
Insurance	214	188
Utilities	2182	2488
Goods & Services	17113	17921
Sales Tax	1482	605
Miscellaneous	6946	6946
Renter Total Cost	67656	64602
Renter Index	100	95.5

Additional Columns Desired

Homeowner Tax		
Homeowner mortgage interest		
Homeowner annual cost of maintenance		
Homeowner misc expenses		



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#### APPENDIX 4: CANADIAN ARMED FORCE (CAF) LIVING LOCATIONS

Aldergrove	<b>BC</b>	Kingston	<b>ON</b>	Saint John	<b>NS</b>
Aldershot	<b>NS</b>	Kitchener	<b>ON</b>	Saskatoon	<b>SK</b>
Bathurst	<b>NB</b>	Lac-mégantic	<b>PQ</b>	Sault Ste Marie	<b>ON</b>
Borden/Barrie	<b>ON</b>	Lethbridge	<b>AB</b>	Sept-Îles	<b>PQ</b>
Brantford	<b>ON</b>	London	<b>ON</b>	Sherbrooke	<b>PQ</b>
Bridgewater	<b>NS</b>	Meaford	<b>ON</b>	Shilo	<b>MB</b>
Brockville	<b>ON</b>	Medicine Hat	<b>AB</b>	St John's	<b>NF</b>
Calgary	<b>AB</b>	Mirabel	<b>PQ</b>	Ste-Jean	<b>PQ</b>
Cambridge	<b>ON</b>	Moncton	<b>NB</b>	St-Georges (Beauce)	<b>PQ</b>
Charlottetown	<b>PE</b>	Montmagny	<b>PQ</b>	St-Hyacinthe	<b>PQ</b>
Saguenay/bagotville	<b>PQ</b>	Montreal	<b>PQ</b>	Stratford	<b>ON</b>
Chilliwack	<b>BC</b>	Moose Jaw	<b>SK</b>	Sudbury	<b>ON</b>
Cold Lake	<b>AB</b>	Nanaimo	<b>BC</b>	Sydney	<b>NS</b>
Comox	<b>BC</b>	Niagara/St Catharine	<b>ON</b>	Thunder Bay	<b>ON</b>
Corner Brook	<b>NF</b>	North Bay	<b>ON</b>	Timmins	<b>ON</b>
Cornwall	<b>ON</b>	Ottawa/Gatineau	<b>ON</b>	Toronto	<b>ON</b>
Debert	<b>NS</b>	Owen Sound	<b>ON</b>	Trail	<b>BC</b>
Dundurn	<b>SK</b>	Petawawa	<b>ON</b>	Trenton	<b>ON</b>
Edmonton	<b>AB</b>	Peterborough	<b>ON</b>	Trois-Rivières	<b>PQ</b>
Gagetown/Fredericton	<b>NB</b>	Pictou	<b>NS</b>	Vancouver	<b>BC</b>
Gander	<b>NF</b>	Portage La Prairie	<b>MB</b>	Victoria	<b>BC</b>
Grand Falls-Windsor	<b>NF</b>	Prince Albert	<b>SK</b>	Wainwright	<b>AB</b>
Greenwood	<b>NS</b>	Quebec City/Valcartier	<b>PQ</b>	Windsor	<b>ON</b>
Guelph	<b>ON</b>	Red Deer	<b>AB</b>	Winnipeg	<b>MB</b>
Halifax	<b>NS</b>	Regina	<b>SK</b>	Yarmouth	<b>NS</b>
Hamilton	<b>ON</b>	Rimouski	<b>PQ</b>	Yorkton	<b>SK</b>
Kamloops/Kelowna	<b>BC</b>	Rivière-Du-Loup	<b>PQ</b>		
Kenora	<b>ON</b>	Rouyn-Noranda	<b>PQ</b>		



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**ANNEX B - BASIS OF PAYMENT**

The firm prices specified below include all expenses that may need to be incurred to satisfy the terms of the contract, including any training materials and the total estimated cost of any travel and living expenses that may need to be incurred for the Work described in Annex A, Statement of Work.

All prices are in Canadian Dollars, Applicable Taxes excluded, FOB destination, freight charges included, Canadian customs duties and excise taxes included.

Description	Firm All-Inclusive Rate (Can \$)
<b>Initial Period Year 1: From the date of contract to one year later</b>	
Delivery and acceptance of the April 2020 PLD calculations, including an integrated comprehensive package of reports called the “Canadian Department of National Defence PLD Survey Methodology Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A;	[to be inserted in the resulting contract]
Delivery and acceptance of the April 2019 SE Report, including a comprehensive package of reports called the “Canadian Department of National Defence Separation Expense (SE) Survey Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A.	[to be inserted in the resulting contract]
Delivery and acceptance of the April 2020 SE Report, including a comprehensive package of reports called the “Canadian Department of National Defence Separation Expense (SE) Survey Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A.	[to be inserted in the resulting contract]
<b>Option Period 1 (if exercised): From end of Initial Period Year 1 to one year later</b>	
Delivery and acceptance of the April 2021 PLD calculations, including an integrated comprehensive package of reports called the “Canadian Department of National Defence PLD Survey Methodology Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A;	[to be inserted in the resulting contract]
<b>Option Period 2 (if exercised): From end of Option Period 1 to one year later</b>	
Delivery and acceptance of the April 2022 PLD calculations, including an integrated comprehensive package of reports called the “Canadian Department of National Defence PLD Survey Methodology Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A;	[to be inserted in the resulting contract]
<b>Option Period 3 (if exercised): From end of Option Period 2 to one year later</b>	



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Delivery and acceptance of the April 2023 PLD calculations, including an integrated comprehensive package of reports called the “Canadian Department of National Defence PLD Survey Methodology Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A;	[to be inserted in the resulting contract]
<b>Option Period 4 (if exercised): From end of Option Period 3 to one year later</b>	
Delivery and acceptance of the April 2024 PLD calculations, including an integrated comprehensive package of reports called the “Canadian Department of National Defence PLD Survey Methodology Report” compliant with the requirements set out in the Statement of Work (SOW) Annex A;	[to be inserted in the resulting contract]



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**ANNEX C - NON-DISCLOSURE AGREEMENT**

**[Details to be inserted in the resulting contract]**

I, \_\_\_\_\_, recognize that in the course of my work as an employee or subcontractor of \_\_\_\_\_, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract \_\_\_\_\_ between Her Majesty the Queen in right of Canada, represented by the Minister of National Defence and \_\_\_\_\_, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce, copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract \_\_\_\_\_.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date