Canada Revenue Agency   Agence du revenu du Canada

Request for Information

No. RFI7132021

Secure Email Solution

For

The Canada Revenue Agency

Closing Date and Time: 2:00PM (EDT), August 16, 2021

Disclaimer

Responding to this Request for Information (RFI) is not a prerequisite to receiving or being eligible to bid on any Request for Proposal (RFP) for this requirement. Any RFP will be advertised on the Government Electronic Tendering Service (GETS) commonly referred to as Buy and Sell (https://buyandsell.gc.ca/).

This RFI is not to be construed as a solicitation for tenders or proposals. No contract or other form of commitment will be entered into based on responses to this RFI. This RFI is not considered as authorization by the Canada Revenue Agency (CRA) to undertake any work that would result in costs to CRA.

Nothing in this RFI shall be construed as a commitment from CRA to issue an RFP for this program. CRA may use non-proprietary information provided in its review and/or in the preparation of any formal RFP. All responses will be held by CRA on a confidential basis (subject to applicable federal legislation) and remain the property of CRA once they have been received.

CRA may reproduce or photocopy or transcribe the response and any non-proprietary supporting documentation for the purpose of its review and/or inclusion in any resulting RFP document. Vendors responding to this RFI are advised to clearly identify which (if any) portions of their responses are proprietary and may be invited to a meeting to further clarify their responses to questions provided in Appendix A herein. The confidentiality of each vendor's response will be maintained.

CRA shall not be bound by anything stated herein. CRA reserves the right to change, at any time, any or all parts of the requirements as it deems necessary. CRA also reserves the right to revise its procurement approach, as it considers appropriate, either based upon information submitted in response to this RFI or for any other reason it deems appropriate.

Interactive Demonstration Sessions

CRA may at its sole discretion entertain presentations/demonstrations with interested vendors to provide them with the opportunity for a follow-up to their written response to present their capabilities in relation to this RFI.

Vendors that have expressed such interest and have demonstrated via their response to the RFI that their products(s) correspond sufficiently to the product questions as stated herein may be contacted within two weeks of the RFI closing date to schedule the demonstration.

The demonstration can be on site at a CRA office located in the National Capital Region (NCR) or remote utilizing audio and/or video conferencing tools such as WebEx.or MS Teams. The time frame for each session will be a maximum of 2 hours.

Responses and Enquiries:

Responses to questions must be submitted complete and in writing in the order shown. All requests for information in all sections of this document must be answered as concisely as possible while providing all information necessary to understand the proposed solution. Any deviation from the question or requirements that cannot be satisfied by the vendor must be clearly identified.

Any information of a confidential or proprietary nature contained in a Vendor's response should be clearly marked 'PROPRIETARY' or 'CONFIDENTIAL' by item or at the top of each page.

Responses to this RFI will not be used to pre-qualify or otherwise restrict participation in any future procurement process (e.g. an RFP). Responses will not be formally evaluated.

CRA will not reimburse any expenditure incurred in preparing responses and participating in the presentation sessions related to this RFI.

The Vendor must provide a contact name, email address and telephone number when submitting their response.

Vendors are requested to submit responses by 11:59PM (EST), August 15, 2021 Eastern Daylight Time. Responses received after this date/time will not be reviewed.

Electronic submissions are mandatory and should be submitted as one complete package.

Vendors are requested to submit responses to this RFI using the following e-mail

E-mail: val.wawrzynczak@cra-arc.gc.ca

All enquiries must be submitted via email to the attention of Val Wawrzynczak at val.wawrzynczak@cra-arc.gc.ca or by phone at (613) 614-9655

Summary of Canada Revenue Agency Requirement

The Canada Revenue Agency (CRA) is investigating the need for an enterprise level secure email solution, external to existing CRA portals, which would enable the Agency to share confidential information with CRA clients (taxpayers, representatives, benefit recipients and others).

CRA's client surveys have consistently shown that they would prefer to communicate with the CRA using email. In addition to this preference, some CRA clients cannot obtain the information or services they are looking for through the CRA portals (My Account, My Business Account, Represent a Client). A secure email solution would provide the mechanism for these clients to interact with the Agency.

The overall requirements for a secure email solution must include, but is not limited to, the following functions:

- Identity Proofing

- Credential Creation and Recovery

- User Authentication and Authorization

- Ability to support Encryption/Decryption and Digital Signatures

- Ability to support the use of emails in external client facing operations, including:
    - Composing emails,
    - Sending and Receiving emails
    - Inbox tools and management
    - Archiving and search tools
    - External system Integration

For the purposes of assisting vendors to respond to this RFI, CRA is considering the target solution to be divided into 2 sub-groups of related functions:

Subgroup1
- Identity Proofing
- Credential Creation and Recovery
- User Authentication and Authorization

Subgroup 2
- Encryption/Decryption, Digital Signatures
- Ability to support the use of emails in external client facing operations

Vendors are encouraged to respond to this RFI if their solution can meet all or substantial portions of either subgroup 1, 2 or both. Specific Questions for these subgroups can be found in Appendix A and B.

The purpose of this RFI is to:

1. Determine vendor capabilities in providing a suitable, secure email solution that can meet CRA's requirements.

2. Help CRA understand industry standards, best practices, and/or recommendations in terms of using secure email in a public service environment.

3. Provide an opportunity for industry to demonstrate and discuss its software functionalities, capabilities, and constraints.

4. Solicit feedback on options for integrating the solution with external platforms and systems.

5. Solicit feedback on the cost, schedule, level of effort, hardware requirements and technical architecture.

Constraints to be considered for the proposed solution

Official Languages - Must meet the Government of Canada standard under the Official Languages Act (accessible via the following hyperlink http://laws-lois.justice.gc.ca/eng/acts/o-3.01/).
Specifically – user interfaces, functionality and documentation in English and French.

Accessibility – Must meet the Government of Canada standard under the Accessible Canada Act (accessible via the following hyperlink https://laws-lois.justice.gc.ca/eng/acts/A-0.6/).

Privacy - Must meets the Government of Canada standard under the Privacy Act (accessible via the following hyperlink http://laws-lois.justice.gc.ca/eng/acts/p-21/).

Data Residency – Any SaaS cloud hosted solutions must host the data in Canada

User access – Must support limiting user access (user profiles) and configuration

Integration – Must provide support for document and records management either internally or externally

Retention – Must have flexible file retention rules

Appendix A – Subgroup 1 Questions

The following questions are representative of the type of information the CRA is seeking as it considers how to structure any RFP that might follow this RFI process.

Vendors must note that this list of questions is not exhaustive; vendors are invited to provide any additional information that might prove useful and/or beneficial to the CRA in preparing any subsequent RFP.

Vendors that provide written feedback may be invited to a one-on-one consultation session with CRA representatives. This session would allow vendors to provide additional feedback pertaining to this RFI as well as to explain comments made in their written submission.

A.1 – ID Proofing, Credential Creation and Recovery, User Authentication and Authorization	
A.1.1	Describe your identity proofing solution.
A.1.2	What are the available licensing models?
A.1.3	Provide two examples where your solution was implemented. Include implementation time, common success factors, and obstacles in standardizing this solution.
A.1.4	What type of technical documentations do you provide for your application (e.g. white paper, installation and configuration instruction, release notes, etc.)?
A.1.5	Describe the different types of training you provide for this type of solution.
A.1.6	Does your solution include 3rd party or open source software? If so, please list them
A.1.7	What identity systems do you support currently?
A.1.8	Can additional identity systems be added to your solution? If so, describe the process?
A.1.9	What systems does your solution support and interface with currently?
A.1.10	What is the process to integrate your solution to existing systems?
A.1.11	Describe your credential creation solution.
A.1.12	What certificate authorities do you support currently?
A.1.13	Can additional certificate authorities be added to your solution?
A.1.14	How / where does your solution store and manage digital certificates?
A.1.15	How does your solution guarantee the security / integrity of the digital certificates it manages?
A.1.16	How does your solution distribute digital certificates?
A.1.17	Describe your credential recovery process.
A.1.18	Describe your user authentication solution.
A.1.19	What levels of authority do you recognize / support currently?
A.1.20	Describe your user authorization solution

Appendix B – Subgroup 2 Questions

The following questions are representative of the type of information the CRA is seeking as it considers how to structure any RFP that might follow this RFI process.

Vendors must note that this list of questions is not exhaustive; vendors are invited to provide any additional information that might prove useful and/or beneficial to the CRA in preparing any subsequent RFP.

Vendors that provide written feedback may be invited to a one-on-one consultation session with CRA representatives. This session would allow vendors to provide additional feedback pertaining to this RFI as well as to explain comments made in their written submission.

B.1 – Encryption / Decryption and Digital Signatures, Email Services	
B.1.1	Describe your encryption / decryption solution
B.1.2	What are the available licensing models?
B.1.3	Provide two examples where your solution was implemented. Include implementation time, common success factors, and obstacles in standardizing this solution.
B.1.4	What type of technical documentations do you provide for your application (e.g. white paper, installation and configuration instruction, release notes, etc.)?
B.1.5	Describe the different types of training you provide for this type of solution.
B.1.6	Does your solution include 3rd party or open source software? If so, please list them
B.1.7	What type/level of encryption is provided?
B.1.8	Describe your email solution Is it an "add-on" to existing platforms or a separate email system?
B.1.09	What digital certificate stores does your system integrate with currently? Can additional stores be added?
B.1.10	What tools are available to users to compose emails and to control/manage the content in the composition process?
B.1.11	How does your solution support the ability to search content?
B.1.12	What document and records management capabilities does the solution contain? Is there support for external solution integration?
B.1.13	What external systems can your solution integrate with?