



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

**SOLICITATION AMENDMENT**  
**MODIFICATION DE L'INVITATION**

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

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

**Comments - Commentaires**

**Vendor/Firm Name and Address**  
**Raison sociale et adresse du**  
**fournisseur/de l'entrepreneur**

**Issuing Office - Bureau de distribution**  
Land Projects and Communication System Support  
Division/Div des projets terrestres et support de  
systèmes de communication  
11 Laurier St. / 11, rue Laurier  
8C2, Place du Portage, Phase III  
Gatineau  
Québec  
K1A 0S5

<b>Title - Sujet</b> LC4ISR - SoS E&I LC4ISR - System of System Engineering and Integration (SoS E&I)	
<b>Solicitation No. - N° de l'invitation</b> W8486-200731/C	<b>Amendment No. - N° modif.</b> 001
<b>Client Reference No. - N° de référence du client</b> W8486-200731	<b>Date</b> 2022-02-18
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$RA-005-28482	
<b>File No. - N° de dossier</b> 055ra.W8486-200731	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> Eastern Standard Time EST <b>on - le 2022-03-31</b> Heure Normale du l'Est HNE	
<b>F.O.B. - F.A.B.</b> Specified Herein - Précisé dans les présentes <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input checked="" type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Wijaya, Yessica	<b>Buyer Id - Id de l'acheteur</b> 055ra
<b>Telephone No. - N° de téléphone</b> (873) 355-1542 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b>	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

**The purpose of this amendment is to:**

1. Inform the interested Suppliers that DLCSPM System Engineering Plan (SEP) is available via RFI (W8486-200731/B) Amendment 003. Bidders are requested to access it and provide their feedback to the Contracting Authority.
2. Publish the following Annexes, as attached herewith, for interested suppliers' feedback.
  - Annex G – Industrial and Technological Benefits – Bidder Instructions
  - Annex H – Industrial and Technological Benefits – Evaluation Plan
3. Inform the interested Suppliers that the closing date of the draft RFP may be extended depending on the publication date of the remaining annexes.

***All other terms and conditions of the draft RFP remain unchanged.***

**LAND C4ISR CAPABILITY  
SYSTEM OF SYSTEMS  
ENGINEERING & INTEGRATION  
SUSTAINMENT SERVICES  
(SoS E&I)**

**Industrial and Technological Benefits (ITB)**

**Value Proposition  
Bidder Instructions**

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## 1. INTRODUCTION

- 1.1 On February 5, 2014, the Government of Canada announced the Defence Procurement Strategy (DPS). One of the objectives of the DPS is to leverage purchases of defence equipment to create jobs and economic growth in Canada. The Industrial and Technological Benefits (ITB) policy has objectives that will be achieved through a weighted and rated Value Proposition (VP) that will form part of the evaluation plan to award the Contract.
- 1.2 The strategic VP objective for the System of Systems Engineering & Integration Sustainment Services project (the Project) is to encourage long-term investments and partnerships with Canadian industry, including Small and Medium Business. Additionally, the VP will encourage investments in R&D and Skills Development & Training in the Key Industrial Capabilities of Artificial Intelligence, Cyber Resilience, and Defence Systems Integration. This objective has been informed by extensive industry engagement and consultation, as well as by in-depth analyses of capabilities related to the procurement.
- 1.3 The Bidder must submit a responsive VP Proposal (Proposal) at bid closing. The Proposal will be deemed responsive by the ITB Authority if it meets i) the Mandatory Requirements outlined in Section 4; and ii) the Minimum Assessment Values outlined in Section 3 of the VP Evaluation Plan (Evaluation Plan). Should the Proposal be deemed responsive, it will then be evaluated related to the rated criteria outlined in Section 6 and receive points as outlined in Section 4 of the Evaluation Plan.
- 1.4 VP evaluation results will be conveyed to the Contracting Authority, who will then integrate them into the overall bid evaluation results, as outlined in Part 4 – Evaluation Procedures and Basis of Selection of the draft RFP of the procurement’s evaluation plan.
- 1.5 It is the responsibility of the ITB Authority, in cooperation with the regional development agencies and subject matter experts, to ensure that Proposals are evaluated as outlined in the Evaluation Plan.

## 2. GENERAL INSTRUCTIONS

- 2.1 In preparing its Proposal, the Bidder should be guided by these Bidder Instructions, as well as by the Evaluation Plan and the ITB Terms and Conditions. All three documents provide important guidance, definitions and/or contractual provisions related to the ITB policy. Defined terms not otherwise defined in this document have the meaning given to them in the ITB Terms and Conditions and

the Request for Proposal, including appendices, to which these Bidder Instructions are attached.

2.2 The Proposal must be submitted in a separate, self-contained volume. Only the Proposal is reviewed during the evaluation. In order to facilitate the evaluation process, any material contained in another section of the Bid but relevant to the Proposal should be repeated in the Proposal.

2.3 One(1) electronic copy (PDF) of the Proposal is required.

2.4 The Proposal, and its receipt, storage and protection by the ITB Authority, is governed by applicable federal laws and processes.

### **3. Canada's ITB Objectives**

3.1 Canada wishes to ensure that its investments in defence-related goods and services generate economic benefit to Canada and have long-term and high-value impacts on Canadian industry, in advanced technology areas. The Proposal should clearly indicate how proposed business activities support Canada's ITB objectives set out below, and how they will be achieved if the Bidder wins the ensuing Contract.

3.2 Defence Sector: A core objective of the ITB policy is to ensure that defence procurement supports the economic development and long-term sustainment of Canada's Defence Sector. The Bidder is encouraged to propose a maximum amount of business activities in Canada involving work directly on the procurement, and work in the Defence Sector more broadly.

3.3 Supplier Development: The development of supplier productivity and competitiveness among Canadian-based suppliers is a key objective of the ITB policy. The Bidder is encouraged to propose meaningful opportunities for growth and supply chain integration to suppliers across Canada.

3.4 Research and Development (R&D): An important objective of the ITB policy is to encourage innovation, as R&D can position Canadian Companies to move up the value chain and capture market opportunities. The Bidder is encouraged to propose R&D investments in Canada and locate high value research and engineering work in Canada, positioning Canadian companies to benefit from its subsequent commercialization.

3.5 Regional Development: The regional development objectives of the ITB policy are to encourage long-term quality improvements to the capability, capacity,

international competitiveness and growth potential of Canadian Companies in those regions where Canada has established specific initiatives to promote economic growth and diversification through procurement. Canadian Companies in all the Designated Regions of Canada should have the opportunity to participate in the Project.

- 3.6 Small and Medium Businesses (SMB): It is an objective of Canada to encourage the participation of SMB as suppliers on major federal procurements and to increase their competitiveness and export market access. Canadian SMB should have the opportunity to participate in the Project.

#### **4. Mandatory Requirements**

- 4.1 There are six (6) mandatory requirements that the Bidder must meet in its Proposal. The omission of any part of the following six (6) requirements will result in the Proposal being deemed not responsive:
- 4.1.1 Requirement One: The Proposal must commit to achieving Transactions, measured in Canadian Content Value (CCV), valued at not less than 100 percent (100%) of the Contract Price (including options), to be achieved within the Achievement Period. For the winning Bidder, its commitment to not less than one hundred percent (100%) will become an Obligation that must be achieved under the Contract.
  - 4.1.2 Requirement Two: The Bidder must commit to achieving not less than fifteen percent (15%) of the Contract Price (including options) in SMB Transactions, measured in CCV.
  - 4.1.3 Requirement Three: The Bidder must commit to achieving not less than eighty percent (80%) of the Contract Price (including options) in Direct Transactions, measured in CCV.
  - 4.1.4 Requirement Four: In its Proposal, the Bidder must:
    - 4.1.4.1 specify its Bid Price, not including taxes and rounded to the nearest dollar;
    - 4.1.4.2 identify Transactions that are detailed, fully described and equal in total to not less than thirty percent (30%) of the Bid Price, measured in CCV;

- 4.1.4.3 commit to identifying, two (2) years after the Effective Date of the Contract, additional Transactions that are detailed, fully described and bring the cumulative total of identified Transactions to not less than sixty percent (60%) of the Contract Price (including options), measured in CCV; and,
- 4.1.4.4 commit to identifying, four (4) years after the Effective Date of the Contract, additional Transactions that are detailed, fully described and bring the cumulative total of identified Transactions to one hundred percent (100%) of the Contract Price (including options), measured in CCV.
- 4.1.5 Requirement Five: The Bidder must accept and comply with all of the ITB Terms and Conditions.
- 4.1.6 Requirement Six: The Proposal must contain the following components, each of which is more particularly described in Section 5:
  - 4.1.6.1 Company Business Plan;
  - 4.1.6.2 ITB Management Plan;
  - 4.1.6.3 Regional Development Plan;
  - 4.1.6.4 Small and Medium Business Development Plan;
  - 4.1.6.5 Detailed sheets for proposed Transactions being submitted by the Bidder, accompanied by a summary chart of them; and
  - 4.1.6.6 Mandatory requirements certificate, as set out in Appendix A, signed by a duly authorized company official.
  - 4.1.6.7 Rated criteria certificate, as set out in Appendix B, signed by a duly authorized company official.

## **5. ASSESSMENT OF MANDATORY REQUIREMENTS**

- 5.1 The following section details the content that is expected to be in each of the components of the mandatory requirements referred to above in Section 4.1.6. The Plans will be assessed during the evaluation, based on quality and risk, as outlined in Section 3.1 of the Evaluation Plan.
- 5.2 Each Plan should respond to all of the requested items outlined below. Responses should be detailed and, wherever appropriate, provide an indication of how items will contribute to the Bidder meeting Canada's ITB objectives.
- 5.3 Each Plan should address, wherever appropriate, the Bidder's approach to the following risk areas:



- 5.3.1 Experience (i.e. practise elsewhere);
- 5.3.2 Capability (i.e. know-how and tools in place);
- 5.3.3 Planning (i.e. organized, proactive);
- 5.3.4 Resources (i.e. team, facilities, information); and
- 5.3.5 Engagement (i.e. interaction with stakeholders)

#### 5.4 Company business Plan

- 5.4.1 The purpose of the company business Plan is to demonstrate the ability of the Bidder to assemble, plan and describe its proposed team to complete the work on the Project. The Plan should also demonstrate the ability of the Bidder and its team to meet the ITB objectives. The anticipated length of the Plan is approximately seven to ten (7-10) pages, depending on the size of the Bidder's team.
- 5.4.2 The Bidder's company business Plan should contain the following information:
  - 5.4.2.1 An outline of the structure, conduct and performance of the business operations of the Bidder and each of its proposed Eligible Donors that are performing work on the Project;
  - 5.4.2.2 A detailed overview of the proposed role of each company in delivering the work on the Project, the proposed location of that work, and the key personnel in each company who would be responsible for delivering that work;
  - 5.4.2.3 An organizational chart for each company outlining its worldwide corporate operations, that clearly states the corporate family structure, parent and subsidiary relationships, and the location of key responsibility centres (i.e. headquarters, manufacturing, service centres, R&D, marketing);
  - 5.4.2.4 A list of each company's existing Canadian facilities, including the location, date of establishment, nature of operations, number of employees, and place within the worldwide corporate structure; and
  - 5.4.2.5 A description of the broad and long-term impacts of the Work on the Canadian economy and how these respond to the ITB objectives in Section 3.

#### 5.5 ITB Management Plan

- 5.5.1 The purpose of the ITB management Plan is to demonstrate the Bidder's ability to develop, implement, manage and report on the Obligations for the full duration of the Achievement Period. It is also the place for Bidder to formally list its proposed Eligible Donors. The anticipated length of the Plan is approximately six to eight (6-8) pages.
- 5.5.2 The ITB management Plan should include the following information:
- 5.5.2.1 A description of the ITB management functions and associated organization that the Bidder envisions necessary to successfully meet the Obligations. It should include a summary of the methods, processes and procedures that the Bidder will use to identify, submit, track, record keep and report on ITB activities. The summary should be presented in a level of detail sufficient to demonstrate that the Bidder fully understands its obligations;
- 5.5.2.2 The name, contact details and biographical information of the Bidder's ITB official(s) assigned to the Project and/or job descriptions for the proposed positions;
- 5.5.2.3 An explanation of the Bidder's internal processes for ITB organization, advocacy and awareness, both specific to the Project and in general. The Bidder should include a description of how ITB considerations will be factored into the company's broader decision-making processes, along with how these decisions will be documented and tracked;
- 5.5.2.4 A description of any previous ITB/IRB/offset obligations that have been undertaken by the Bidder over the past ten (10) years, in Canada and elsewhere, along with a brief overview of the achievement status of each project; and
- 5.5.2.5 A list of the Bidder's proposed Eligible Donors and contact details for each, along with details and documentation justifying how each company meets the Eligible Donor criteria outlined in the ITB Terms and Conditions.
- All proposed Eligible Donors are subject to review and approval by the ITB Authority during evaluation. Only those proposed Eligible Donors that are found to meet the criteria will be included on the list of Eligible Donors in the ensuing Contract. Any proposed Transaction with a company not meeting the Eligible Donor criteria will be rejected.

## 5.6 Regional development Plan

5.6.1 The purpose of the regional development Plan is to demonstrate the Bidder's commitment to providing opportunities and assistance for businesses in the Designated Regions of Canada. The anticipated length of the Plan is approximately five to seven (5-7) pages.

5.6.2 The regional development Plan should include the following information:

5.6.2.1 Identification and description of the Bidder's proposed Transactions in the Designated Regions of Canada, the total of which will become Obligations to be achieved under Article 3 of the ITB Terms and Conditions. The Plan may also identify any higher regional commitment target to which the Bidder is prepared to commit contractually;

5.6.2.2 A description of the Bidder's business rationale for its regional approach;

5.6.2.3 A description of the activities and approaches undertaken to date by the Bidder and its proposed Eligible Donors that have resulted in the distribution of proposed Transactions to the Designated Regions of Canada;

5.6.2.4 A description of the activities and approaches that will be undertaken after Contract award until the end of the Achievement Period to improve the opportunities available to the Designated Regions of Canada; and

5.6.2.5 A description of how regional considerations are factored into the Bidder's ITB decision-making processes.

## 5.7 Small and Medium Business (SMB) development Plan

5.7.1 The purpose of the SMB development Plan is to demonstrate the Bidder's commitment to providing opportunities, assistance and encouragement to SMB in Canada. The anticipated length of the Plan is approximately five to seven (5-7) pages.

5.7.2 The SMB development Plan should include the following information:

- 5.7.2.1 Identification and description of the Bidder's proposed Transactions involving SMB in Canada, the total of which, or fifteen (percent (15%) of the Contract Price, whichever is higher will become Obligations to be achieved under Article 3 of the ITB Terms and Conditions;
- 5.7.2.2 A description of the activities and approaches undertaken to date by the Bidder and its proposed Eligible Donors that have resulted in the proposed distribution of SMB Transactions;
- 5.7.2.3 A description of the activities and approaches that will be undertaken after Contract award until the end of the Achievement Period to improve the opportunities available to SMB;
- 5.7.2.4 A description of how SMB considerations are factored into the Bidder's ITB decision-making processes; and
- 5.7.2.5 A description of any initiatives and/or assistance (at a broad corporate level or specific to the Project) that would be provided to SMB to help stimulate and promote them, both as potential suppliers to the Project and for their capability to pursue and undertake new business activities. Examples could include financing or special payment provisions.

## 5.8 Detailed Transaction sheets

- 5.8.1 The Proposal will provide a separate and detailed transaction sheet for each Transaction that the Bidder proposes and for which it is prepared to commit contractually. A template of the transaction sheet is attached as Appendix B to the ITB Terms and Conditions.
- 5.8.2 Foreign currency
  - 5.8.2.1 If a Transaction involves foreign currency, the Contractor must convert the total CCV of the transaction based on the Daily Noon Exchange Rate published by the Bank of Canada on a date related to transaction commencement (e.g. date of submission to bank, date of investment, or date of sub-contract award).

- 5.8.3 In addition to the individual transaction sheets, the Bidder will include a summary chart of all of its proposed Transactions. The summary chart should clearly identify each Transaction and provide a breakdown, with appropriate sub-totals and percentages, by: direct, indirect, region, SMB and rated criteria. The summary chart should provide a very brief description of how each proposed Transaction aligns with the rated criteria, to compliment the more detailed justifications located in the transaction sheet. The Bidder may use a format of its choice for the summary chart.
- 5.8.4 The Bidder should include a forecast plan for the Transactions due two (2) and four (4) years following the Effective Date of the Contract, respectively. The forecast plan should include such information as, but not limited to: a list of any Canadian Companies being considered; and/or, the specific capabilities being sought from Canadian suppliers.
- 5.8.5 The Bidder is strongly encouraged to fully complete every section of the transaction sheet, as outlined below, so that the proposed Transaction can be properly evaluated. The Bidder should also provide details and documentation within its Proposal, as indicated, in support of Transaction eligibility. Failure to adequately describe and/or document the proposed Transaction may result in it being rejected as not meeting the Transaction eligibility criteria.
- 5.8.6 Identifying a Transaction for the purposes of Section 4.1.3 means presenting a signed transaction sheet to the ITB Authority, which names both a specific Eligible Donor and a specific Recipient, describes the business activity in detail, provides valuation information, and complies with the Bidder Instructions and the ITB Terms and Conditions with respect to eligibility criteria, valuation, transaction types and banking.
- 5.8.7 In the event that the Bidder identifies Transactions in its Proposal valued at more than any minimum requirement stated in the Bidder Instructions:
- 5.8.7.1 no additional points will be scored in the rated evaluation, above those outlined in the Evaluation Plan; and
- 5.8.7.2 the Obligation values in Article 3 of the Terms and Conditions will be increased to match the total value of those Transactions.
- 5.8.8 Instructions for transaction sheets:

#### 5.8.8.1 Overview

- Title and number (*provide a brief title identifying the activity and a unique number in simple, sequential order, for reference purposes*)
- Date of submission (*date of Proposal*)
- Tranche (*the Proposal is tranche 1*)

#### 5.8.8.2 Contractor information (information regarding the proposed Contractor on the Project)

#### 5.8.8.3 Donor information (information regarding the proposed Donor on the Project)

#### 5.8.8.4 Recipient information (Notes: i) the company description should include locations, business history and core capabilities; ii) see Article 8.1.5 of the Terms and Conditions for other Recipient requirements.)

#### 5.8.8.5 Valuation and time phasing (specify the overall CCV values as applicable, plus the detailed commitment schedule broken out by 12 month periods, which mirror the Reporting Periods)

- For the purposes of the evaluation process, the multiplied or enhanced value of a proposed Transaction involving a credit multiplier, future sales achievement or CCV enhancement, as described in Article 7 of the Terms and Conditions, will not be considered. Only the face value of the initial investment, or the estimated CCV, in the proposed Transaction will be considered. Any multiplied credit values, future sales achievements or enhanced CCV will be counted after the Effective Date of the Contract.

#### 5.8.8.6 Transaction details

- Type of Transaction (*direct or indirect, pooled, banked*)
- Description of Transaction (*provide a detailed description of the proposed activity, including: nature of work; location of work in Canada, estimated quantities and timelines; any end-use market, platform or program; and, other relevant information*)

- VP activity (*yes or no*)
  - Defence related (*yes, no or dual-use*)
  - Supplier Development (*yes or no*)
  - Small and Medium Business (*yes or no*)
  - R&D (*yes or no*); and
  - Skills Development and Training (*yes or no*)
  - Export (*yes or no*)
- Justification for VP classifications above (*clearly demonstrate and document alignment with VP requirements*)
- Activity type (*i.e. purchase, investment*)
- North American Industry Classification Code System (NAICS) categorizing type of business activity (*enter a primary, secondary, and tertiary NAICS code*)
- Industrial activity type (*pick one business activity type that applies best*)
- Investment framework (*if applicable*)
  - Allowable investment type (*i.e. cash grant, cash purchase of shares, licence for brand or trademark, licence for IP, loan of employee, transfer of equipment, transfer of software, or transfer of systems*)
  - Type of R&D or commercialization activity (*i.e. test analysis, applied research, business planning, feasibility studies*)
  - Business Plan (*template in Appendix D of Terms and Conditions*)
  - Valuation documentation included (*agreement or in-kind valuation report, as appropriate*)

5.8.8.7 Consortium member information (*if applicable*);

5.8.8.8 Transaction eligibility criteria (be as specific and detailed as possible in addressing how a proposed Transaction meets each eligibility criteria, which are outlined in the ITB Terms and Conditions. Include all details, documentation and certificates in the Proposal)

#### 5.8.8.9 Other

- Canadian government assistance (*describe the date and details of any assistance provided -- either to the specific activity, the Eligible Donor, or the Recipient -- from any level of government in Canada*)
- CCV overview (*indicate which CCV calculation method was used*)
- Level of technology (*for Indirect Transactions, indicate whether the level of technology is the same or higher than the Project*)
- Key Industrial Capabilities (*select applicable KICs*)

#### 5.8.8.10 Signature (an authorized official at the Bidder's or proposed Eligible Donor's company)

### 5.9 Mandatory requirements certificate

5.9.1 The Bidder must submit with its Proposal the mandatory requirements certificate (Appendix A), completed with their company name and Bid Price, and signed and dated by a company official duly authorized to bind the company.

5.9.2 The Bidder must submit with its Proposal the rated criteria certificate (Appendix B) signed and dated by a company official duly authorized to bind the company.

## 6. RATED CRITERIA

6.1 Value Proposition: The Bidder should provide information and details on its VP commitments, and proposed Transactions, which will be rated as described in Section 4 of the Evaluation Plan. The Bidder must complete and submit the rated criteria certificate (Appendix B), signed and dated by a company official duly authorized to bind the company.

6.1.1 The Proposal should include the Bidder's Commitment to achieve Transactions involving Supplier Development with non-SMBs. The Commitment should be expressed as a percentage of the Contract Price, including options and measured in CCV. Should the Bidder be awarded the Contract, this Commitment will become an Obligation to be completed within the Achievement Period.



- 6.1.1.1 Bidders should indicate their Commitments to Supplier Development with SMBs above the fifteen percent (15%) mandatory minimum for bid evaluation purposes.
- 6.1.1.2 The total value of the Bidder's Commitment to both Supplier Development Transactions excluding SMBs and Supplier Development Transactions involving SMBs cannot exceed one hundred percent (100%) of the Contract Price.
- 6.1.1.3 The Bidder's Commitments involving Supplier Development Transactions must also clearly distinguish between the Bidder's Commitment to Supplier Development Transactions involving SMBs. Failure to clearly indicate this difference may result in zero points at evaluation.
- 6.1.1.4 If the Bidder makes Commitments to achieve Transactions involving Supplier Development, the Bidder must identify Transactions that are detailed, fully described and equal in total to not less than ten percent (10%) of the total Supplier Development Commitment. These Transactions must clearly demonstrate how the work aligns with the definition of Supplier Development as per the ITB Terms and Conditions.
- 6.1.1.5 If the Bidder makes Commitments to achieve Transactions involving Supplier Development, they may score additional points in this rated criteria for identifying Transactions involving Supplier Development above the required ten percent (10%) of the total Supplier Development Commitment, up to thirty percent (30%). These Transactions must clearly demonstrate how the work aligns with the definition of Supplier Development as per the ITB Terms and Conditions.
- 6.1.1.6 Transactions that align with Supplier Development that are identified in the Proposal will become Obligations to be completed within the Achievement Period.
- 6.1.2 The Proposal should include the Bidder's Commitment to achieve Transactions involving Research and Development. The Commitment should be expressed as a percentage of the Contract Price, including options and measured in CCV. Should the Bidder be awarded the Contract this Commitment will become an Obligation to be completed within the Achievement Period.

- 6.1.2.1 The total value of the Bidder's Commitment to Research and Development Transactions cannot exceed twenty percent (20%) of Contract Price. No points will be awarded for Commitments beyond twenty percent (20%) of Contract Price.
- 6.1.2.2 The Bidder's Commitments involving Research and Development Transactions must be in the Key Industrial Capabilities of Artificial Intelligence, Cyber Resilience or Defence Systems Integration.
- 6.1.2.3 If the Bidder makes Commitments to achieve Transactions involving Research and Development, they may score additional points in this rated criteria for identifying Transactions involving Research and Development above the required ten percent (10%) of the total Research and Development Commitment, up to twenty percent (20%). These Transactions must clearly demonstrate how the work aligns with the definition of Research and Development as per the ITB Terms and Conditions.
- 6.1.2.4 If the Bidder makes Commitments to achieve Transactions involving Research and Development, they may score additional points in this rated criteria for identifying Transactions involving Research and Development above the required ten percent (10%) of the total Research and Development Commitment, up to twenty percent (20%). These Transactions must clearly demonstrate how the work aligns with the definition of Research and Development as per the ITB Terms and Conditions.
- 6.1.2.5 Transactions that align with Research and Development that are identified in the Proposal will become Obligations to be completed within the Achievement Period.
- 6.1.3 The Proposal should include the Bidder's Commitment to achieve Transactions involving Skills Development and Training. The Commitment should be expressed as a percentage of the Contract Price, including options and measured in CCV. Should the Bidder be awarded the Contract this Commitment will become an Obligation to be completed within the Achievement Period.
- 6.1.3.1 The total value of the Bidder's Commitment to Skills Development and Training cannot exceed twenty percent (20%) of Contract Price. No points will be awarded for Commitments beyond twenty (20%) of Contract Price.

- 6.1.3.2 The Bidder's Commitments involving Skills Development and Training must be in the Key Industrial Capabilities of Artificial Intelligence, Cyber Resilience or Defence Systems Integration.
- 6.1.3.3 If the Bidder makes Commitments to achieve Transactions involving Skills Development and Training, the Bidder must identify Transactions that are detailed, fully described and equal in total to not less than ten percent (10%) of the total Skills Development and Training Commitment. These Transactions must clearly demonstrate how the work aligns with the definition of Research and Development as per the ITB Terms and Conditions.
- 6.1.3.4 If the Bidder makes Commitments to achieve Transactions involving Skills Development and Training, they may score additional points in this rated criteria for identifying Transactions involving Skills Development and Training above the required ten percent (10%) of the total Skills Development and Training Commitment, up to twenty percent (20%). These Transactions must clearly demonstrate how the work aligns with the definition of Skills Development and Training as per the ITB Terms and Conditions.
- 6.1.3.5 Transactions that align with Skills Development and Training that are identified in the Proposal will become Obligations to be completed within the Achievement Period.

## **7. BANKING AND POOLING**

- 7.1 Banking and pooling are described in the ITB Terms and Conditions. The Bidder may use bank Transactions, or a pooled portion thereof, as part of its Proposal.
- 7.1.1 The Bidder submitting a bank Transaction in its Proposal should include: i) a copy of the approved banked transaction sheet; and, ii) the most recent annual bank statement, authorized by the ITB Authority and dated before the release date of the Request for Proposal (RFP) to which the Proposal responds.
- 7.1.2 The Bidder submitting a pooled portion of a bank Transaction should include the most recent bank statement for that portion, authorized by the ITB Authority and dated before the release date of the RFP to which the Proposal responds.
- 7.1.3 In all cases, the value on the bank statement will be the one used during the evaluation process.

- 7.1.4 A pooled Transaction, or portion thereof, may only be included in the Proposal if it originates from the bank.
- 7.2 If a bank Transaction is used as part of a Proposal, the evaluation committee will consider the Transaction as accepted for meeting the Transaction eligibility criteria, with the exception of Eligible Donor.
  - 7.2.1 A bank Transaction will be evaluated to confirm that it meets the Eligible Donor criteria for the Project, outlined in Article 8 of the Terms and Conditions.
- 7.3 Acceptance of a Transaction in the bank does not guarantee Value Proposition points. All bank Transactions will be evaluated to determine Value Proposition scoring, as outlined in the Evaluation Plan.
- 7.4 The Bidder may submit bank Transactions of any CCV value in its Proposal. The entire CCV value of bank Transactions submitted in the Proposal will become an Obligation to be achieved under Article 3 of the Contract. However, any CCV value of bank Transactions that exceeds fifty percent (50%) of the total for all Transactions identified in the Proposal will not be counted in the evaluation.
- 7.5 The Bidder is encouraged to submit any proposed bank Transactions to the ITB bank well in advance of RFP release. Any bank Transaction, or portion thereof, included in the Proposal where the date of the authorized bank statement falls after the RFP release date for the Project will not be considered in the mandatory or rated evaluation. Further, that bank Transaction will not become a commitment to be achieved under the Contract.

### Appendix A - Mandatory requirements certificate

The Bidder, \_\_\_\_\_, declares and certifies that through this Proposal for the Project, the Bidder satisfies the following requirements:

Mandatory Requirement	Specific Terms and Conditions Commitment
1. Commits to achieving Transactions valued at not less than ____ percent of the Contract Price ( <i>one hundred percent (100%) or the percentage represented the total of all identified Transactions, whichever is higher</i> ), (including options) measured in Canadian Content Value (CCV), to be achieved within the Achievement Period.	Article 3.1.1
2. Commits to achieving not less than fifteen percent (15%), of the Contract Price (including options) in Small and Medium Business Transactions, measured in CCV.	Article 3.1.2.2
3. The Bidder must commit to achieving not less than eighty (80%) percent of the Contract Price (including options) in Direct Transactions, measured in CCV.	Article 3.1.4
4. Identifies its Bid Price (not including taxes and rounded to the nearest dollar) \$	
4(a). Identifies Transactions equal in total to not less than thirty percent (30%) its Bid Price, measured in CCV.	
4(b) Commits to identifying, two (2) years after the Effective Date of the Contract, additional Transactions that bring the cumulative total of identified Transactions to at least sixty percent (60%) of the Contract Price (including options), measured in CCV;	Article 3.2.1
4(c) Commits to identifying, four (4) years after the Effective Date of the Contract, additional Transactions that bring the cumulative total of identified Transactions to one hundred percent (100%) of the Contract Price (including options), measured in CCV.	Article 3.2.2
5. Accepts all of the ITB Terms and Conditions.	All articles and appendices.
6. Has submitted all the following required components of a Proposal: <ul style="list-style-type: none"> <li>• Company business plan;</li> <li>• ITB management plan;</li> <li>• Regional development plan;</li> <li>• Small and medium business development plan;</li> <li>• Detailed Transaction sheets, accompanied by a summary chart of all Transactions</li> </ul>	Appendix A

<ul style="list-style-type: none"><li>• This mandatory requirements certificate, duly completed, signed and dated.</li></ul>	

IN WITNESS THEREOF THIS MANDATORY REQUIREMENTS CERTIFICATE HAS BEEN SIGNED THIS \_\_\_\_\_ DAY OF \_\_\_\_\_ BY A SENIOR COMPANY OFFICIAL WHO IS DULY AUTHORIZED TO BIND THE COMPANY.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
NAME AND TITLE OF SENIOR COMPANY OFFICIAL

### Appendix B - Rated criteria certificate

The Bidder, \_\_\_\_\_, declares and certifies that, through this Proposal for the *LC4ISR Capability System of Systems Engineering and Integration Sustainment Services*, the Bidder makes the following Commitments, in response to the rated criteria outlined in section 6:

<b>Rated Criteria</b>	<b>Bidder Commitment Above Minimum Requirement</b>	<b>Maximum Points Available for Commitment Above Minimum Requirement</b>	<b>Terms and Conditions Commitment</b>
<b>1.1 Supplier Development</b>		<b>30</b>	
Commitment to Supplier Development Transactions, excluding SMBs	%		Article 3.1.2.1
Commitment to Supplier Development Transactions, including SMBs	%		Article 3.1.2.2
<i>Article 3.1.2.1 and Article 3.1.2.2 will include the percentage value of either the commitment or the identified Transactions, whichever is higher</i>			
<b>1.2 Research and Development</b>		<b>25</b>	
Commitment to R&D Transactions	%		Article 3.1.2.3
<i>Article 3.1.2.3 will include the percentage value of either the commitment or the identified Transactions, whichever is higher</i>			
<b>1.3 Skills Development and Training</b>		<b>15</b>	
Commitment to Skills Development and Training Transactions	%		Article 3.1.2.4
<i>Article 3.1.2.4 will include the percentage value of either the commitment or the identified Transactions, whichever is higher</i>			

IN WITNESS THEREOF THIS RATED CRITERIA CERTIFICATE HAS BEEN SIGNED  
THIS \_\_\_\_\_ DAY OF \_\_\_\_\_ BY A SENIOR COMPANY  
OFFICIAL WHO IS DULY AUTHORIZED TO BIND THE COMPANY.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
NAME AND TITLE OF SENIOR COMPANY OFFICIAL

**LAND C4ISR CAPABILITY  
SYSTEM OF SYSTEMS  
ENGINEERING & INTEGRATION  
SUSTAINMENT SERVICES  
(SoS E&I)**

**Industrial and Technological Benefits (ITB)**

**Value Proposition Evaluation Plan**



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- 2 MANDATORY REQUIREMENTS
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- 4 RATED EVALUATION
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## 1. INTRODUCTION

- 1.1. The purpose of the Value Proposition (VP) Evaluation Plan (Evaluation Plan) is to describe the methodology that will be used to evaluate the VP Proposal (Proposal) submitted by the Bidder.
- 1.2. The Proposal will be evaluated as either compliant or non-compliant. The Proposal will be deemed compliant if it: i) meets all of the mandatory requirements outlined in Section 2; and, ii) meets the minimum assessment values outlined in Section 3 of this document.
- 1.3. All compliant bids will then be evaluated based on the rated criteria, as outlined in Section 4 of this document.
- 1.4. The results of the evaluation will be conveyed to the Contracting Authority. The results will then be integrated into the overall bid evaluation results, as outlined in Part 4 – Evaluation Procedures and Basis of Selection of the draft RFP of the LC4ISR Capability System of Systems Engineering & Integration Sustainment Services project's (the Project) evaluation plan.
- 1.5. The Bidder is strongly encouraged to closely review the entire Bidder Instructions document.
- 1.6. Defined terms not otherwise defined in this document have the meaning given to them in the ITB Terms and Conditions and the Request for Proposal, including appendices, to which this Evaluation Plan is attached.

## 2. MANDATORY REQUIREMENTS

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

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

2. Bidder commits to achieving not less than eighty percent (80%) of the Contract Price (including options) in Direct Transactions, measured in CCV.	
3. Bidder commits to achieving not less than fifteen percent (15%) of the Contract Price (including options) in Small and Medium Business Transactions, measured in CCV.	
4. Bidder has specified its Bid Price (not including taxes and rounded to the nearest dollar).	Mandatory requirements certificate is duly signed and submitted, with Bid Price provided.
4(a). Bidder has identified Transactions which are detailed, fully described and equal in total to not less than thirty percent (30%) of the Bid Price, measured in CCV.	CCV value of each Transaction in the Proposal is totalled, then compared against the Bid Price. Mandatory requirements certificate is duly signed and submitted.
4b. Bidder commits to identifying two (2) years after the Effective Date of the Contract, Transactions that are detailed, fully described and bring the cumulative total of identified Transactions to not less than sixty percent (60%) percent of the Contract Price (including options), measured in CCV.	Mandatory requirements certificate is duly signed and submitted.
4c. Bidder commits to identifying four (4) years after the Effective Date of the Contract, Transactions that are detailed, fully described and bring the cumulative total of identified Transactions to one hundred percent (100%) of the Contract Price (including options), measured in CCV	
5. Bidder accepts all of the ITB Terms & Conditions.	
6. Bidder submits all the required components in its Proposal: <ul style="list-style-type: none"> <li>• Company business Plan</li> <li>• ITB management Plan</li> <li>• Regional development Plan</li> <li>• Small and Medium Business development Plan</li> <li>• Detailed transaction sheets, accompanied by a summary chart of all Transactions.</li> <li>• Signed Mandatory requirements certificate</li> </ul>	Presence of each required component in the Proposal and the Mandatory requirements certificate is duly signed and submitted.
<b>Table 2-1, Mandatory Requirements Evaluation Chart</b>	

### 3. MINIMUM ASSESSMENT VALUES

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

3.1.1. The Bidder's four Plans will be evaluated to confirm that they are present in the Proposal. The Plans are then assessed for quality and for risk, using the assessments in Tables 3-1 and 3-2.

3.1.2. Quality will be assessed as to whether the Plans respond to the requested components outlined in Section 5 of the Bidder Instructions, the level of detail in the component, and how well the content of the Plan meets the ITB Objectives outlined in Section 3 of the Bidder Instructions.

3.1.3. Quality will be assessed on a scale of one (1) to four (4), using the values below in Table 3-1.

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

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

3.1.4. Risk will be assessed as to whether the Plans respond to the risk areas outlined in Section 5 of the Bidder Instructions and the level of detail provided.

- 3.1.5. Risk will be assessed on a scale of one (1) to four (4), using the values below in Table 3-2.

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

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

- 3.1.6. The quality and risk assessments agreed to by evaluators will be multiplied together and the sums added together to determine the final Plans assessment value for the Proposal.
- 3.1.7. The Bidder must achieve or exceed a final Plans assessment value of thirty-two (32) (out of a possible sixty-four (64)).

**EXAMPLE:**

Plan	Quality (A)	Risk (B)	Assessment Value (C) (C) = (A) x (B)
Company business Plan	4	3	12
ITB management Plan	2	3	6
Regional development Plan	4	4	16
SMB development Plan	4	2	8

<b>Final plans assessment value</b>			<b>42</b>
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Table 3.3 - Example

### 3.2. Evaluation of proposed Transactions

- 3.2.1. The Bidder's proposed Transactions will be evaluated to determine whether they comply with the Bidder Instructions and with the ITB Terms and Conditions, with respect to eligibility criteria, valuation, banking and transaction types.
- 3.2.2. If a proposed Transaction does not meet the criteria outlined in 3.3.1, it will be rejected and will receive no further consideration during the mandatory or rated evaluation, or in the Contract.
- 3.2.3. If a proposed Transaction meets the criteria outlined in 3.3.1, it will then be evaluated using the rated evaluation criteria outlined in Section 4.

## 4. RATED EVALUATION

- 4.1. The Bidder's proposed Commitments and Transactions will be evaluated against the rated criteria as described below.
  - 4.1.1. Supplier Development: The Bidder should identify Commitments to achieve Transactions, involving Supplier Development activities, as further described in Section 6.1.1 of the ITB Bidder Instructions. The Bidder will be scored on Commitments involving Supplier Development as follows:
    - 4.1.1.1. The Bidder's Supplier Development Commitment with non-SMBs listed in the Bidders Instructions document's Rated Criteria Certificate, section 1.1, will receive one (1) point for each percentage of the Contract Price committed.
    - 4.1.1.2. The Bidder's Supplier Development Commitment with SMBs listed in the Bidders Instructions document's Rated Criteria Certificate, Section 1.1, will receive one and a half (1.5) points for every percentage of Contract Price committed above the fifteen percent (15%) mandatory minimum.
    - 4.1.1.3. No points will be awarded for Commitments in Supplier Development above one hundred percent (100%) of Contract Price.

4.1.1.4. Points will only be awarded in Supplier Development if the Bidder identifies Transactions that are detailed, fully described and equal in total to not less than ten percent (10%) of the total Supplier Development Commitment, calculated by the Bidder's Bid Price. If the Bidder does not meet this requirement, no points in this criteria will be awarded, and a score of zero (0) will be used for evaluation purposes.

4.1.1.5. The Supplier Development total point rating is calculated by totalling the points accumulated in the two Supplier Development categories. The Bidder with the highest Supplier Development total point rating will receive thirty (30) points. All other Bidders will receive a prorated score against the highest Supplier Development total point rating.

Example of prorated scoring for Supplier Development :

Supplier Development	VP Points	Bidder 1 Contractual Commitment	Bidder 2 Contractual Commitment	Bidder 3 Contractual Commitment
Supplier Development Commitment with non-SMBs	(1 X multiplier)	30%	5%	15%
Supplier Development Commitment with SMBs above 15% mandatory minimum	(1.5 X multiplier)	6%	20%	0%
<b>Total Supplier Development Commitment</b>		<b>36%</b>	<b>25%</b>	<b>15%</b>
<b>Supplier Development Total Point Rating</b>		$(6 \times 1.5) + 30 = 39$	$(20 \times 1.5) + 5 = 35$	$(0 \times 1.5) + 15 = 15$
<b>Pro-rated VP score for Supplier Development Commitment</b>		$39/39 \times 30 = 30$	$35/39 \times 30 = 26.9$	$15/39 \times 30 = 11.5$

4.1.1.6. The Bidder will be awarded additional points to their Supplier Development score if the Bidder identifies Transactions above ten percent (10%) of the total Supplier Development Commitment, provided the Transactions are detailed and fully described.

- 4.1.1.6.1. The Bidder will receive half a point (0.5) for each one percent (1%) of the total Supplier Development Commitment identified beyond the minimum ten percent (10%), up to a maximum of ten (10) points.

Example of transaction identification scoring for Supplier Development:

<b>Supplier Development</b>	<b>Bidder 1</b>	<b>Bidder 2</b>	<b>Bidder 3</b>
Total Supplier Development Commitment	36%	25%	15%
Bidder's Bid Price	\$75M	\$125M	\$100M
Bidder's Commitment Based on Bid Price	\$27M (\$75M x .36)	\$31.25M (125 x .25)	\$15M (100 x .15)
Minimum Supplier Development Transaction Identification Requirement	\$2.7M (27 x .10)	\$3.125M (31.25 x .10)	\$1.5M (1.5 x .10)
\$ Value of Supplier Development Transactions Identified by Bidder Above Minimum Requirement	\$1M	\$5M	\$3M
% Above Minimum Requirement	3.7% (1/27)	16% (5/31.25)	20% (3/15)
Points for Identification Above Minimum Requirement	1.85 (3.7 x 0.5)	8 (16 x 0.5)	10 (10 x 0.5)
<b>Supplier Development Overall Score (Commitments &amp; Identified)</b>	<b>31.85</b> (30 + 1.85)	<b>34.9</b> (26.9 + 8)	<b>21.5</b> (11.5 + 10)

- 4.1.2. Research and Development: The Bidder may identify Commitments to achieve Transactions, measured in CCV, in Research and Development activities, as described in Section 6.1.2 of the ITB Bidder Instructions. The Bidder will be scored on Commitments to Research and Development as follows:

- 4.1.2.1. The Bidder's Research and Development Commitment listed in the Bidder's Instructions document's Rated Criteria Certificate Section 1.2 will receive one (1) point for each percentage of the Contract Price committed.



4.1.2.2.No points will be awarded for Commitments in Research and Development beyond fifteen percent (15%) of the Contract Price.

4.1.2.3.Points will only be awarded in Research and Development if the Bidder identifies Transactions that are detailed, fully described and equal in total to not less than ten percent (10%) of the total Research and Development Commitment, calculated by the Bidder's Bid Price. If the Bidder does not meet this requirement, no points in this criteria will be awarded, and a score of zero (0) will be used for evaluation purposes.

4.1.2.4.The Bidder with the highest Research and Development Commitment will receive twenty-five (25) points. All other Bidders will receive a prorated score against the highest Research and Development Commitment.

Research and Development	VP Points	Bidder 1 Contractual Commitment	Bidder 2 Contractual Commitment	Bidder 3 Contractual Commitment
Research and Development Commitment	(1 X multiplier)	5%	15%	10%
<b>Pro-rated VP score for Research and Development Commitment</b>		$5/15 \times 25 = 8.33$	$15/15 \times 25 = 25$	$10/15 \times 25 = 16.66$

4.1.2.5.The Bidder will be awarded additional points to their Research and Development total point rating if the Bidder identifies Transactions above ten percent (10%) of the total Research and Development Commitment, provided the Transactions are detailed and fully described.

4.1.2.5.1. The Bidder will receive one point (1) for each one percent (1%) of the total Research and Development Commitment identified above the minimum ten percent (10%), up to a maximum of ten (10) points.

4.1.3. Skills Development and Training: The Bidder may identify Commitments to achieve Transactions, measured in CCV, in Skills Development and Training, as described in Section 6.1.3 of the ITB Bidder Instructions. The Bidder will be scored on Commitments to Skills Development and Training as follows:

4.1.3.1. The Bidder's Skills Development and Training Commitment listed in the Bidder's Instructions document's Rated Criteria Certificate Section 1.3 will receive one (1) point for each percentage of the Contract Price committed.

4.1.3.2. No points will be awarded for Commitments in Skills Development and Training beyond five percent (5%) of the Contract Price.

4.1.3.3. Points will only be awarded in Skills Development and Training if the Bidder identifies Transactions that are detailed, fully described and equal in total to not less than ten percent (10%) of the Skills Development and Training Commitment, calculated by the Bidder's Bid Price. If the Bidder does not meet this requirement, no points in this criteria will be awarded, and a score of zero (0) will be used for evaluation purposes.

4.1.3.4. The Bidder with the highest Skills Development and Training Commitment will receive fifteen (15) points. All other Bidders will receive a prorated score against the highest Skills Development and Training Commitment.

<b><u>Skills Development and Training</u></b>	<b>VP Points</b>	<b>Bidder 1 Contractual Commitment</b>	<b>Bidder 2 Contractual Commitment</b>	<b>Bidder 3 Contractual Commitment</b>
<b><u>Skills Development and Training</u></b> Commitment	(1 X multiplier)	5%	5%	3%
<b>Pro-rated VP score for Skills Development and Training Commitment</b>		5/5 x 15 = 15	5/5 x 15 = 15	3/5 x 15 = 9

4.1.3.5. The Bidder will be awarded additional points to their Skills Development and Training total point rating if the Bidder identifies Transactions above ten percent (10%) of the total Skills Development and Training Commitment, provided the Transactions are detailed and fully described.

4.2. The Bidder will receive one point (1) for each one percent (1%) of the total Skills Development and Training Commitment identified above the minimum ten percent (10%), up to a maximum of ten (10) points. Any identified Transactions in the Proposal will be assessed to determine whether they align with each of the rated evaluation criteria identified in sections 4.1.1 through 4.1.3. The Bidder

should provide a level of detail sufficient to support the claim that the Transaction fits within a given criteria.

- 4.2.1. Transactions where the Bidder does not demonstrate alignment with the rated evaluation criteria will not be included as part of the Bidder's Commitments in the rated evaluation, but would be included as a Commitment to be achieved in the Contract.
- 4.2.2. Transactions where the Bidder demonstrates alignment with the rated evaluation criteria will be included as part of the Bidder's Commitments in the rated evaluation and included as a Commitment to be achieved in the Contract.
- 4.3. One identified Transaction may be aligned with multiple criteria and will be scored as such, up to the maximum total points. All Transactions and Commitments identified in the Proposal will be included as a Commitment and/or Obligation to be achieved in the ensuing Contract.
- 4.3.1. In the event that the total of the Bidder's Transactions identified in the Proposal aligning with any of the rated VP criteria, expressed as a percentage of Contract Price, is greater than the Bidder's Commitment in the same VP criteria as indicated on the Rated Criteria Certificate, the higher value will be considered as the Bidder's Commitment in the rated evaluation and be included as an Obligation to be achieved in Article 3 of the ensuing Contract.

4.4. Table 4.3 below summarizes the rated evaluation scoring:

Criteria	Available Points	Basis of Evaluation
<b>Supplier Development</b>		
Commitment to Supplier Development Transactions, excluding SMBs	30	Commitment on signed rated criteria certificate
Commitment to Supplier Development Transactions, including SMBs		
Identified Transactions involving Supplier	10	Overall value of identified Transactions which demonstrate alignment to Supplier Development

Development above 10% of Commitment		against the Bidder's Commitment to Supplier Development, as a percentage (%)
<b>Research and Development</b>		
Commitment to Research and Development Transactions	25	Commitment on signed rated criteria certificate
Identified Transactions involving Research & Development above 10% of Commitment	10	Overall value of identified Transactions which demonstrate alignment to Research and Development against the Bidder's Commitment to Research and Development, as a percentage (%)
<b>Skills Development and Training</b>		
Commitment to Skills Development and Training Transactions	15	Commitment on signed rated criteria certificate
Identified Transactions involving Skills Development and Training above 10% Commitment	10	Overall value of identified Transactions which demonstrate alignment to Skills Development and Training against the Bidder's Commitment to Skills Development and Training, as a percentage (%)
<b>Total Points</b>	100	

**Table 4.3 – Rated Evaluation Scoring**

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

## 5. PROCESS

5.1. The evaluation is led by the ITB Authority, with participation from representatives of the regional development agencies, and, if required, other subject matter experts.

5.2. Evaluation assessments and scoring will be carried out by consensus, wherein the Bidder's Proposal will be read, discussed and each evaluator will agree to a score for each rated element. Consensus on broader issues will be sought, such that evaluators agree on the need for and nature of any clarifying questions or advice sought from outside experts. Where consensus on scoring, issues or other questions cannot be reached following discussion, the ISED lead evaluator will make the final decision.

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