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The Articles contained in this document are mandatory in their entirety, unless otherwise indicated. Acceptance of these Articles, in their entirety, as they appear in this document, is a Mandatory requirement of this RFP.

Suppliers submitting a proposal containing statements implying that their proposal is conditional on modification of these clauses or containing terms and conditions that purport to supersede these clauses or derogate from them will be considered non-responsive.

Bidders with concerns regarding the provisions of the Bid Solicitation document (including the Resulting Contract Clauses) should raise such concerns in accordance with the Enquiries provision of this RFP.



PART 1 - GENERAL INFORMATION

1.1 Introduction

The bid solicitation is divided into seven 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 Security and Other Requirements: includes specific requirements that must be addressed by Bidders; and

Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work and the Basis of Payment.

The Appendixes include the Evaluation Criteria and the Financial Proposal Form.

1.2 Summary

By means of the RFP, Natural Resources Canada (NRCan) is seeking proposals to build upon and expand the scope of the previous studies by diving deeper into regional, provincial/territorial (PT) and municipal differences and needs regarding the amount and type of charging infrastructure over time, as well as assessing of the grid readiness and investment needed to ready the grid to accept new charging infrastructure

The resulting contract will be from date of award to December 15, 2023.

1.2.1 This bid solicitation allows bidders to use the epost Connect service provided by Canada Post Corporation to transmit their bid electronically. Bidders must refer to Part 2 entitled Bidder Instructions, and Part 3 entitled Bid Preparation Instructions, of the bid solicitation, for further information.



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 will be done in writing, by email.



PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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 Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.

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.

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 modifications to the text below. If there is a conflict between the provisions of 2003 and this document, this document prevails.

- **In the complete text content (except Section 1 and 3) Delete:** Public Works and Government Services Canada” and **Insert:** “Natural Resources Canada.” **Delete:** “PWGSC” and **Insert:** “NRCan”
- **Section 2: Delete:** “Suppliers are required to” and **Insert:** “It is suggested that suppliers”
- **Subsection 1 of Section 8: Delete entirely**
- **Subsection 2 of Section 8:**
Delete: : The only acceptable email address to use with CPC Connect for responses to bid solicitations issued by PWGSC headquarters is: tpsgc.pareceptiondessaoumissions-apbidReceiving.pwgsc@tpsgc-pwgsc.gc.ca, or, if applicable, the email address identified in the bid solicitation. : The only acceptable email address to use with CPC Connect for responses to bid solicitations issued by PWGSC headquarters is: tpsgc.pareceptiondessaoumissions-apbidReceiving.pwgsc@tpsgc-pwgsc.gc.ca, or, if applicable, the email address identified in the bid solicitation.
Insert: The only acceptable email address to use with CPC Connect for responses to bid solicitation issued by NRCan is: <mailto:procurement-approvisionnement@NRCan-RNCan.gc.ca>
Subsection 2b of Section 8:
Delete: “six business days”
Insert: “five business days”
- **Under Subsection 2 of Section 20:** Delete in its entirety

2.2 Submission of Bids

Bids must be submitted only to the Natural Resources Canada (NRCan) Bid Receiving Unit specified below by the date and time indicated on page 1 of the bid solicitation.

Only bids submitted using post Connect service will be accepted.

At least five (5) days before the bid solicitation closing date, it is necessary for the Bidder to send an email requesting to open CPC Connect conversation to the following address:

<mailto:procurement-approvisionnement@NRCan-RNCan.gc.ca>



Note: Bids will not be accepted if e-mailed directly to this address. This e-mail address is to be used to open CPC Connect conversation, as detailed in the Standard Instructions [2003 \(Subsection of Section 08\)](#), or to send bids through CPC Connect message if the bidder is using its own licensing agreement for CPC Connect.

IMPORTANT: It is requested that you write the bid solicitation number in “Subject” of the email:

NRCan – 5000072313 Light-duty vehicle EVSE Requirements for Canada

NRCan will not assume responsibility for proposals directed to any other location.

The onus is on the Bidder to ensure that the bid is submitted correctly using epost Connect service. Not complying with the instructions may result in NRCan’s inability to ascertain reception date and/or to consider the bid prior to contract award. Therefore, NRCan reserves the right to reject any proposal not complying with these instructions.

Due to the nature of the bid solicitation, bids transmitted by mail or facsimile to NRCan will not be accepted.

2.3 Enquiries - Bid Solicitation

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.

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.

2.4 Applicable Laws

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

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.



2.5 Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least Five (5) days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

2.6 Basis for Canada's Ownership of Intellectual Property

Natural Resources Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following reasons: as set out in the [Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts](#)

Where the main purpose of the Crown Procurement Contract, or the deliverables contracted for, is:

To generate knowledge and information for public dissemination.



PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

Canada requests that Bidders provide their bid in separately bound sections as follows:

Section I: Technical Bid (1 electronic copy)

Section II: Financial Bid (1 electronic copy) in a separate file and document

Section III: Certifications (1 electronic copy)

Section IV: Additional Information (one (1) electronic copy)

Prices should appear in the financial bid only. No prices should be indicated in any other section of the bid.

Canada requests that Bidders follow the format instructions described below in the preparation of their bid:

- (a) use 8.5 x 11 inch (216 mm x 279 mm) format;
- (b) use a numbering system that corresponds to the bid solicitation.

Section I: Technical Bid

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.

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.

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Financial Proposal Form in Appendix 2. The total amount of Applicable Taxes must be shown separately.

Section III: Certifications

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



Section IV: Additional Information

In Section IV of their bid, bidders should provide:

1. the 1st page of this RFP signed with their legal name;
2. the name of the contact person (provide also this person's mailing address, phone numbers 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.



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 including the Technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

4.1.1 *Technical Evaluation*

Mandatory and point rated technical evaluation criteria are included in Appendix 1 - Evaluation Criteria.

4.2 Basis of Selection

4.2.1 *Highest Combined Rating of Technical Merit and Price*

1. To be declared responsive, a bid must:
 - a) comply with all the requirements of the bid solicitation; and
 - b) meet all mandatory criteria; and
 - c) obtain the required minimum of 55 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 95 points.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points equal 135 and the lowest evaluated price is \$45,000 (45).



| Basis of Selection - Highest Combined Rating Technical Merit (70%) and Price (30%) | | | | |
|---|------------------------------|-----------------------------|----------------------------|----------------------------|
| | | Bidder 1 | Bidder 2 | Bidder 3 |
| Overall Technical Score | | 115/135 | 89/135 | 92/135 |
| Bid Evaluated Price | | \$55,000.00 | \$50,000.00 | \$45,000.00 |
| Calculations | Technical Merit Score | $115/135 \times 70 = 59.63$ | $89/135 \times 70 = 46.15$ | $92/135 \times 70 = 47.70$ |
| | Pricing Score | $45/55 \times 30 = 24.55$ | $45/50 \times 30 = 27$ | $45/45 \times 30 = 30$ |
| Combined Rating | | 84.18 | 73.15 | 77.70 |
| Overall Rating | | 1st | 3rd | 2nd |



PART 5 - CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

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.

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 (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/1/2003/25#integrity-provisions>), all bidders must provide with their bid, **if applicable**, the Integrity declaration form available on the Forms for the Integrity Regime website (<http://www.tpsgc-pwgscc.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 property agreement of the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgscc.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.

- Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder or, in the case of a private company, the owners of the company.
- Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s).



- Bidders bidding as partnerships do not need to provide lists of names.

Name of Bidder: _____

OR

Name of each member of the joint venture:

Member 1: _____

Member 2: _____

Member 3: _____

Member 4: _____

Identification of the administrators/owners:

| SURNAME | NAME | TITLE |
|---------|------|-------|
| | | |
| | | |
| | | |
| | | |
| | | |

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

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" 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#).

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

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.

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 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 non-responsive.

Definitions

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

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or



- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

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

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

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes () No ()**

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

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

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: 2019-01](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **Yes () No ()**

If so, the Bidder must provide the following information:

- a. name of former public servant; _____
- b. conditions of the lump sum payment incentive;



- c. date of termination of employment;

- d. amount of lump sum payment; _____
- e. rate of pay on which lump sum payment is based; _____
- f. period of lump sum payment including:
 - start date _____
 - end date _____
 - and number of weeks _____
- g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

| Professional fees | Amount |
|-------------------|--------|
| | |

5.2.6 Aboriginal Designation

Who is eligible?

- a) An Aboriginal business, which can be:
 - i) a band as defined by the Indian Act
 - ii) a sole proprietorship
 - iii) a limited company
 - iv) a co-operative
 - v) a partnership
 - vi) a not-for-profit organization

in which Aboriginal persons have at least 51 percent ownership and control,

OR

- b. A joint venture consisting of two or more Aboriginal businesses or an Aboriginal business and a non-Aboriginal business(es), provided that the Aboriginal business(es) has at least 51 percent ownership and control of the joint venture.



When an Aboriginal business has six or more full-time employees at the date of submitting the bid, at least thirty-three percent of them must be Aboriginal persons, and this ratio must be maintained throughout the duration of the contract.

The bidder must certify in its submitted bid that it is an Aboriginal business or a joint venture constituted as described above.

- Our Company is NOT an Aboriginal Firm, as identified above.
- Our Company is an Aboriginal Firm, as identified above.

Signature

Date



PART 6 - SECURITY AND OTHER REQUIREMENTS

6.1 Security Requirements

There are no security requirements associated with this requirement.



PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex A and the Contractor's technical bid dated _____. (*to be completed at contract award*)

7.2 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 Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

7.2.1 General Conditions

[2035 \(2022-12-01\)](#), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

- As applicable, replace references to Public Works and Government Services Canada (PWGSC) with Natural Resources Canada (NRCan).

7.2.2 Supplemental General Conditions

The following clauses apply to and form part of this contract:

[4007 \(2010-08-16\)](#), Canada to Own Intellectual Property Rights in Foreground Information

7.3 Dispute Resolution

Mediation

If a dispute arising from this contract cannot be settled amicably through negotiation, then the parties agree in good faith to submit the dispute to mediation as administered by the Arbitration and Mediation Institute of Canada Inc. (AMIC). The parties acknowledge receipt of the rules of AMIC. The cost of mediation shall be borne equally by the parties.

Arbitration

If the parties cannot resolve the dispute through mediation within sixty (60) days, the parties agree to submit the dispute to arbitration pursuant to the Commercial Arbitration Act (Canada). The party requesting such arbitration shall do so by written notice to the other party/parties. The cost of the arbitration and fees of the arbitrator shall be borne equally by the parties. The arbitration shall take place in the city where the contractor carries on business before a single arbitrator to be chosen jointly by the parties. If the parties cannot agree on the choice of arbitrator within thirty (30) days of written



notice to submit the dispute to arbitration, each party will choose a representative who will select the arbitrator.

The parties may determine the procedure to be followed by the arbitrator in conducting the proceedings, or may ask the arbitrator to do so. The arbitrator shall issue a written award within thirty (30) days of hearing the parties. The award may be entered in any court having jurisdiction and enforced as a judgment of that court.

Meaning of "Dispute"

The parties agree that the word "dispute" in this clause refers to a dispute of fact or of law, other than a dispute of public law.

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the *Department of Public Works and Government Services Act* will, on request or consent of the parties to participate in an alternative dispute resolution process to resolve any dispute between the parties respecting the interpretation or application of a term and condition of this contract and their consent to bear the cost of such process, provide to the parties a proposal for an alternative dispute resolution process to resolve their dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa-opo.gc.ca.

7.4 Security Requirements

7.4.1 There is no security requirement applicable to the Contract.

7.5 Term of Contract

7.5.1 *Period of the Contract*

The period of the Contract is from date of Contract to December 15, 2023 inclusive.

7.6 Comprehensive Land Claims Agreements (CLCAs)

The Contract is not subject to any Comprehensive Land Claims Agreements.

7.7 Authorities

7.7.1 *Contracting Authority*

The Contracting Authority for the Contract is:

Name: Julia Pace
Title: Procurement Specialist
Organization: Natural Resources Canada
Address: 1 Challenger Drive, Dartmouth, Nova Scotia
Telephone: 902-719-4856
E-mail address: Julia.pace@nrcan-rncan.gc.ca



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.

7.7.2 Project Authority (to be provided at contract award)

The Project Authority for the Contract is:

Name:

Title:

Organization:

Address:

Telephone:

E-mail address:

The Project 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 Project Authority; however, the Project 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.

7.7.3 Contractor's Representative (to be provided at contract award)

Name:

Title:

Organization:

Address:

Telephone:

E-mail address

7.8 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a [*Public Service Superannuation Act*](#) (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with [Contracting Policy Notice: 2019-01](#) of the Treasury Board Secretariat of Canada.



7.9 Payment

7.9.1 Basis of Payment – Firm Price

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price as specified in Annex B for a cost of \$ _____ (insert the amount at contract award). Customs duties are included and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

7.9.2 Method of Payment

Milestone Payments

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a. an accurate and complete claim for payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

7.10 Invoicing Instructions

Invoices shall be submitted as follows:

E-mail:

Invoicing-Facturation@nrcan-rncan.gc.ca

Note: Attach "PDF" file. No other formats will be accepted

Invoices and all documents relating to a contract must be submitted on the Contractor's own form and shall bear the Contract number: _____

Invoicing Instructions to suppliers: <http://www.nrcan.gc.ca/procurement/3485>

7.11 Certifications and Additional Information

7.11.1 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.

7.12 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

7.13 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- a) the Articles of Agreement;
- b) the supplemental general conditions [4007](#) (2010-08-16) - Canada to Own Intellectual Property Rights in Foreground Information;
- c) the general conditions [2035](#) (2022-12-01), General Conditions - Higher Complexity;
- d) Annex A, Statement of Work;
- e) Annex B, Basis of Payment;
- f) the Contractor's bid dated _____.

7.14 Foreign Nationals (Canadian Contractor OR Foreign Contractor)

SACC Manual clause [A2000C](#) (2006-06-16) Foreign Nationals (Canadian Contractor)

OR

SACC Manual clause [A2001C](#) (2006-06-16) Foreign Nationals (Foreign Contractor)

7.15 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.

7.16 Contract Administration

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the *Department of Public Works and Government Services Act* will review a complaint filed by the supplier respecting administration of this contract if the requirements of Subsection 22.2(1) of the *Department of Public Works and Government Services Act* and Sections 15 and 16 of the *Procurement Ombudsman Regulations* have been met, and the interpretation and application of the terms and conditions and the scope of the work of this contract are not in dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa-opo.gc.ca.





ANNEX A - STATEMENT OF WORK

SW1 TITLE

Light-duty vehicle and Medium-Heavy-duty vehicles, Electric Vehicles Supply Equipment (EVSE) Requirements for Canada – Regional Deep Dives

SW2 BACKGROUND

Within Natural Resources Canada (NRCan), the Clean Fuels Branch (CFB) promotes energy conservation and use of low-carbon fuels and is committed to undertaking initiatives designed to reduce fuel use and greenhouse gas (GHG) emissions in Canada in support of Canada's goal of net zero emissions by 2050 and NRCan's Strategic Objective 2: Environmental Responsibility and Activity 2: Clean Energy.

The CFB's Fuel Diversification Division (FDD) is tasked with informing Canadians and fleet operators regarding the availability of low-carbon fuels in Canada. This information enables decision-makers to make fuel-efficient buying choices. CFB also executes several programs aimed at accelerating the adoption of zero-emission vehicles (ZEV) via infrastructure, awareness and capacity building, the electric vehicle charging station locator map, etc.

In 2019, Dunskey Energy + Climate Advisors supported NRCan's EV infrastructure initiatives by assessing nationwide needs for public charging infrastructure in order to meet the (now old) federal targets for ZEV adoption of 100% sales by 2040. The Government of Canada announced mandatory and aggressive light-duty ZEV sales targets of 100% by 2035, accelerating its previous target by 5 years and MHDV sales target of 100% by 2040, with an interim target of 35% by 2030. Given this new ambition, it is imperative that the deployment of chargers is keeping pace with the expected demand for ZEVs. New charger deployment also produces new demand for ZEV as it allays the concerns of consumers driving ICEV such that the next purchase can be a ZEV. A new study was undertaken by Dunskey Energy + Climate Advisors in 2021/22 that updated the original study and took the new ZEV targets under consideration¹.

The study produced a sound estimate pertaining to the ratio of vehicles to chargers and total charging requirements out to 2050. However, the ratio and electric vehicle supply equipment (EVSE) requirements presented in the study were national in scope and did not provide a regional or sub-regional breakdown or analysis.

The [2022 Dunskey](#) study identified variables such as population density, geography, urbanization, etc. as significant factors in their modelling that would result in regional variances regarding EVSE requirements.

In order to get a more granular picture of the EVSE requirements across Canada, NRCan is aiming to commission a study and modelling work that takes these regional differences into account, from urban to suburban and from rural to remote.

SW3 OBJECTIVES

¹ The final interim targets (at least 20% by 2026) were not finalized at the time of the analysis.



The overall objective of this Statement of Work (SoW) is to build upon and expand the scope of the previous studies by diving deeper into regional, provincial/territorial (PT) and municipal differences and needs regarding the amount and type of charging infrastructure over time, as well as assessing of the grid readiness and investment needed to ready the grid to accept new charging infrastructure

The objectives are:

1. To gather information, summarize and showcase/highlight existing research (where available) on EVSE (public and Multi-unit Residential Buildings, MURBs) needs at the PT and (where available) municipal level.
2. To gather information, summarize and showcase/highlight existing public and MURB EVSE deployment targets at the PT and (where available) municipal level in Canada.
3. To include the Local Distribution Companies or utility perspectives' as important considerations in needs assessment, given logistics depends on distribution systems' capacity to supply electricity through their feeders.
4. To gather information, summarize, and showcase/highlight commitments made by industry (i.e. charging network providers, automakers, etc.) to roll out EVSEs in Canada.
5. Where gaps exist or research methodologies are found to be suboptimal, the study should determine the EVSE requirements for that region by means of applying a methodology that can provide one or several ratios or metrics that convey the projected EVSE needs for these jurisdictions. This should include an EV-to-charger ratio, total EVSE requirements over time, and any other metrics that may be suitable (i.e. Kwh per BEV, chargers per capita, or chargers per kWh of rolling stock). Considering different EV-to-charger targets across the globe (10-1(Europe) and 7-1(California)), provide rationale/justification for the proposed optimal charging ratio. Analysis of charging infrastructure should ideally address duty groups (LDV, MDV & HDV) separately e.g. develop separate EV-to-charger ratios for each group.
6. The study should also estimate the following:
 - I. the annual EVSE deployment required to achieve the government's ZEV sales objectives;
 - II. the total costs of EVSE deployment (public and MURB) including hardware, installation, local electrical upgrades;
 - III. the grid transmission, distribution system, and infrastructure upgrades required to support EVSE deployment;
 - IV. the costs of grid transmission and infrastructure upgrades to support EVSE deployment.

Note: Grid infrastructure should include communication infrastructure, wires, sensors, and other components from the EVSE to the control room. If feasible, the latter should include software, change management, and other commensurate investment required to unlock the capability of system operators. MHDV categorization should address specific issues like



overnight charging lots in cities for MHDVs that cannot be recharged at their home base, as well as ‘along highway’ and ‘in cities’ split for HDV.

7. Modelling should take into consideration current and foreseeable constraints around supply chain issues, technology uncertainties, and provide ranges by means of low, medium, and high scenarios. Note: the possible impact of unpredictable events like lack of competent resources, shift in priority due to COVID-19 pandemic, extreme weather events that can cause delays in deployment
8. To conduct qualitative interviews with key stakeholder organizations, such as industry, utilities, and research organizations from leading jurisdictions on topics relating to best practices for assessing infrastructure needs, especially in advanced jurisdictions where their advanced EV market share can help to assess the adequacy of charging infrastructure to meet the needs of a growing EV population, as well as Canadians industry stakeholders. Utility companies’ quantitative perspective is crucial to understand opportunities and constraints at a local level.
9. To develop and present to NRCan and other interested parties (that NRCan may designate) a proposed draft and final report on the findings of the research and analysis for validation, comments, and feedback by the Project Authority and interested parties.
10. To write and present to NRCan and other interested parties a final report on the findings of the research and analysis, including;
 - a. a summary of the findings;
 - b. an overview of region-specific infrastructure targets;
 - c. a description of the methodology; and
 - d. an analysis of the number and types of charging infrastructure that would be needed in each region under the new federal ZEV sales targets, as well as grid readiness

SW.4 DEFINITION OF REQUIREMENT

SW.4.1 Tasks, Deliverables, Milestones and Schedule

The scope of work includes the following tasks:

| Tasks/Activities | Deliverables | Timeline |
|--|-------------------------------------|--|
| 1. Project Kick-Off <ul style="list-style-type: none"> • Kick-off meeting to prioritize the objectives and priorities of NRCan • Review the methodology and research questions • Review timelines and milestones | Meeting Minutes (MS Word or PDF). | 1 week after the contract signature by the Crown |
| 2. Research and Fact-finding/Data Gathering | White paper on research methodology | To be completed by March 27, 2023 |



| Tasks/Activities | Deliverables | Timeline |
|--|--|--|
| <p>Data plan includes intended sources, risks, risk mitigation, and contingency plans with methodology change impacts should some data ultimately not be available.</p> | <p>and data plan (MS Word or PDF).</p> | |
| <p>3. Stakeholder Interviews</p> <p>This should include interviews with governments, charger manufacturers, network operators, EV owner groups, utilities, research organizations and various representatives from PTs and municipalities that will provide insights into their infrastructure needs.</p> | <p>List of interview questions and interviewees (MS Word or PDF)</p> | <p>To be completed by March 27, 2023</p> |
| <p>4. Modelling of EVSE and Grid Infrastructure Needs – reflecting Tasks 1 - 8</p> <p>This must include EVSE forecasts per year up to 2040; number of chargers, types (Level 2 and DCFC), location (public/workplace MURB), number per province and territory, and ratio of EVs to charger. Must also include grid infrastructure (transmission, distribution, and upgrade) assessment and forecasts Note: Beyond 2030, recommendations should be done with careful consideration since battery and infrastructure technology evolves quickly and will certainly have an impact on the forecast elements above</p> <p>Forecasts must include at least two scenarios with one scenario that follows the projected ZEV uptake under the federal ZEV sales targets, as expressed in the 2022 federal Emissions Reduction Plan for 2030.</p> | <p>Output tables in MS Excel with all graphs developed. Output to be integrated into report as well.</p> | <p>To be completed by September 30, 2023</p> |
| <p>5. Reporting Requirement 1</p> <p>A report will summarize the findings and will include an overview of infrastructure needs and methodologies used</p> | <p>Draft Report for review and comment from the Project Authority (MS Word or PDF)</p> | <p>To be completed by November 1, 2023</p> |
| <p>6. Reporting Requirement 2</p> | <p>Final Report (MS Word or PDF)</p> | <p>Due December 15, 2023</p> |



| Tasks/Activities | Deliverables | Timeline |
|--|--------------|----------|
| Final report that reflects changes and edits requested by Project Authority. | | |

SW.4.2 Reporting Requirements

The contractor shall provide bi-weekly status update emails to NRCan, detailing where they are in relation to their project plan milestones, identifying any delays and/or new barriers to meeting those milestones.

SW 4.3 Method and Source of Acceptance

All deliverables and services rendered under any contract are subject to inspection by the Project Authority. The Project Authority shall have the right to reject any deliverables that are not considered satisfactory.

SW.5.0 OTHER TERMS AND CONDITIONS OF THE SOW

SW.5.1 Contractor’s Obligations

- In addition to the obligations outlined in Sections 4 of this Statement of Work, the Contractor must:
- Submit all written reports in electronic Microsoft Office compatible format;
- Participate in teleconferences, such as on Zoom or Microsoft Teams, as needed, including any requested by NRCan over the duration of the contract period.

SW.5.2 NRCan’s Obligations

- NRCan will provide:
- Access to a staff member who will be available to coordinate activities, and/or, provide other assistance or support.
- Provide the consultant with ZEV sales and stock forecasts where applicable.
- Ensure adequate staff are available to participate actively in consultation sessions and other to achieve contract objectives;
- Coordinate meetings;
- Provide comments on submitted deliverables within five (5) working days; and
- Provide other assistance or support as needed, as capacity allows.

SW.5.3 Location of Work, Work Site and Delivery Point

All work to be completed at the Contractors place of business. Deliverables to be provided to the Project Authority through electronic format (email).

SW.5.4 LANGUAGE PROFILE



Deliverables will be provided in English. Any translation that may be required will be provided by NRCan. The report must adhere to accessibility guidelines outlined by the Government.



ANNEX B - BASIS OF PAYMENT

To be completed at Contract award.



APPENDIX 1 - EVALUATION CRITERIA

Bidders are advised to address these criteria in the following order and in sufficient depth in their proposals to enable a thorough assessment. NRCan’s assessment will be based solely on the information contained within the proposal. NRCan may confirm information or seek clarification from bidders.

Bidders are advised that only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the criteria will not be considered demonstrated for the purpose of this evaluation.

The Bidder should provide complete details as to where, when (month and year) and how (through which activities/responsibilities) the stated qualifications/experience were obtained. Experience gained during formal education shall not be considered work experience. All criteria for work experience shall be obtained in a legitimate work environment as opposed to an educational setting. Co-op terms are considered work experience provided they are related to the required services.

Bidders are also advised that the month(s) of experience listed for a project whose time frame overlaps that of another referenced project will only be counted once. For example: project one time frame is July 2001 to December 2001; project two time frame is October 2001 to January 2002; the total months of experience for these two project references is seven (7) months.

1. Technical Criteria

1.1 Mandatory Evaluation Criteria

The Mandatory Criteria listed below will be evaluated on a simple pass/fail basis. Proposals which fail to meet the mandatory criteria will be deemed non-responsive.

| Item | Mandatory Requirement | Compliant (Yes/No) | Notes (Cross-Referenced to Proposal) |
|-----------|---|---|--------------------------------------|
| M1 | EVSE/Grid Assessment Experience The bidder MUST demonstrate in a minimum of three (3) project summaries completed between December 1, 2018 and the bid solicitation closing date, in conducting <ul style="list-style-type: none"> • analysis of electric vehicle charging infrastructure (EVSE) needs and forecasting on a regional level; • assessment of grid transmission, distribution system, and infrastructure upgrade requirements to support EVSE deployment; • estimating cost associated with EVSE deployment. | <input type="checkbox"/> Yes <input type="checkbox"/> No | |



| | | | |
|------------------|--|---|--|
| | <p>For each project summary, the Bidder should include:</p> <ul style="list-style-type: none"> • Project title and client name/description; • Brief description of the project including scope, objectives, and results. • Duration of each project including commencement and end date (e.g. Project A: December 2018 to September 2019). <p>The bidder should describe the 3 projects within 4 pages, include references with limited use of images, charts, or tables.</p> | | |
| <p>M2</p> | <p><u>Project Manager/Lead Experience</u></p> <p>The project manager/lead MUST demonstrate they have acquired 24 months of experience since December 1, 2018 and this solicitation closing date. The bidder MUST demonstrate the following in a résumé:</p> <ul style="list-style-type: none"> • Experience conducting analysis of electric vehicle charging infrastructure (EVSE) needs/ forecasting on a regional level; and • Experience assessing the grid transmission, distribution system, and infrastructure upgrade requirements; or • <u>Other relevant</u> work experience; or some combination thereof. <p><u>Relevant</u> projects/work experiences include those that are similar in scope and complexity to issues raised under the objectives detailed in the Statement of Work.</p> | <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> | |
| <p>M3</p> | <p><u>KNOWLEDGE & UNDERSTANDING</u></p> <p>The bidder MUST demonstrate knowledge of:</p> <ol style="list-style-type: none"> 1. Charging infrastructure needs of electric vehicles, ideally in Canada 2. Modelling/forecasting of EVSE needs to support EV sales/stock target 3. Modelling/forecasting the impact on the grid transmission, distribution system 4. Canada’s charging context along multiple dimensions such as policies, barriers (technical, economical, and cultural), and opportunities | <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> | |



| | | | |
|------------------|--|---|--|
| | <p>The bidder should describe in a maximum of 4 pages with limited use of images, charts and tables.</p> | | |
| <p>M4</p> | <p><u>ACADEMIC QUALIFICATIONS</u></p> <p>The bidder MUST provide proof (certification) that two-thirds of members of the proposed project team possess a minimum of one (1) undergraduate degree each from a recognized university in any of the following fields:</p> <ul style="list-style-type: none"> • Mathematics; • Economics; • Business; • Science; or • Engineering. <p>A copy of the degree or diploma must be provided in the bidder's proposal.</p> <p>The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the Canadian Information Centre for International Credentials (https://www.cicic.ca/).</p> | <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> | |

1.2 Evaluation of rated criteria

The criteria contained herein will be used by NRCan to evaluate each proposal that has met all of the mandatory criteria.

Proposals must achieve the stated minimum points required overall for the rated criteria to be assessed as responsive under the point rated technical criteria section; proposals not meeting the minimum required points will be deemed non-responsive.

Proposals will be evaluated based on the following criteria:



| Item | Requirement | Max Points | Points awarded | Illustrated Compliance | | | | | | | | | | |
|--|---|---|----------------|------------------------|-------|----------------|--|---|---|----|----|-----------|--|--|
| R1 | <p><u>RESEARCH EXPERIENCE</u></p> <p>The Bidder should provide a minimum three (3) studies they completed since December 1, 2018, related to EVSE and grid readiness that assessed, enumerated and/or examined:</p> <p>Aspects covered in studies:</p> <ol style="list-style-type: none"> 1. Region-specific (urban, rural, remote) EVSE needs (number and type of EVSE for public/MURB, power locations) to support ZEV sale/stock target; (0.5 points) 2. Local market trends, evolving charging technology, and behaviour (0.5 points) 3. Rate of EVSE deployment to meet growing EV stock/target (0.5 points) 4. Associated charging infrastructure investment/cost to meet EVSE needs and ZEV sale target (0.5 points) 5. Readiness of transmission system (system operator, transmitters, utilities, etc.) and distribution system (DERs, BESS, V2G etc.) and other infrastructure (sensors, control room, etc.) (0.5 points) 6. Forecasting of load on the electrical grid due to EV charging as well as grid (transmission& distribution) infrastructure upgrade required (0.5 points) 7. Forecasting of impact and vulnerability level of transmission/distribution system associated with EV charging load growth (0.5 points) 8. Recommendation for strategic deployment of EVSE and infrastructure upgrades to meet needs based on forecast (0.5 points) <table border="1" data-bbox="325 1101 1696 1315"> <thead> <tr> <th data-bbox="325 1101 903 1175">Quantity of Research</th> <th data-bbox="903 1101 989 1175">Score</th> <th data-bbox="989 1101 1427 1175">Relevance of Research</th> <th data-bbox="1427 1101 1534 1175">Score</th> <th data-bbox="1534 1101 1696 1175">Combined score</th> </tr> </thead> <tbody> <tr> <td data-bbox="325 1175 903 1315">the Bidder has undertaken up to six (6) studies relating to various aspects of regional EVSE needs forecasting within the past five (5) years.</td> <td data-bbox="903 1175 989 1315">6</td> <td data-bbox="989 1175 1427 1315">For each study, assign 0.5 points for each of the eight aspects identified here in R1. 4 pts max per project</td> <td data-bbox="1427 1175 1534 1315">24</td> <td data-bbox="1534 1175 1696 1315">30</td> </tr> </tbody> </table> | Quantity of Research | Score | Relevance of Research | Score | Combined score | the Bidder has undertaken up to six (6) studies relating to various aspects of regional EVSE needs forecasting within the past five (5) years. | 6 | For each study, assign 0.5 points for each of the eight aspects identified here in R1. 4 pts max per project | 24 | 30 | 30 | | |
| Quantity of Research | Score | Relevance of Research | Score | Combined score | | | | | | | | | | |
| the Bidder has undertaken up to six (6) studies relating to various aspects of regional EVSE needs forecasting within the past five (5) years. | 6 | For each study, assign 0.5 points for each of the eight aspects identified here in R1. 4 pts max per project | 24 | 30 | | | | | | | | | | |



| Item | Requirement | | | | | Max Points | Points awarded | Illustrated Compliance |
|-----------|---|---|---|----|----|------------|----------------|------------------------|
| | the Bidder has undertaken five (5) studies relating to various aspects of regional EVSE needs forecasting within the past five (5) years. | 5 | For each study, assign 0.5 points for each of the eight aspects identified here in R1. 4 pts max per project | 20 | 25 | | | |
| | the Bidder has undertaken three (3) to four (4) studies relating to various aspects of regional EVSE needs forecasting within the past five (5) years. | 4 | For each study, assign 0.5 points for each of the eight aspects identified here in R1. 4 pts max per project | 16 | 20 | | | |
| | the Bidder has conducted a minimum of three (3) studies relating to various aspects of regional EVSE needs forecasting within the past five (5) years. | 3 | For each study, assign 0.5 points for each of the eight aspects identified here in R1. 4 pts max per project | 12 | 15 | | | |
| | Note: the same projects can be used from M1 | | | | | | | |
| R2 | <p><u>PROJECT APPROACH / METHODOLOGY</u></p> <p>The Bidder’s proposed methodology should account for the following:</p> <ul style="list-style-type: none"> • The Bidder should demonstrate, in their own words, an understanding of the scope of work and objectives. • The Bidder should demonstrate how the proposed methodology will lead to the successful completion of the project objectives and identify the tasks required to produce a final, high-quality product. • The Bidder should demonstrate their knowledge of EVSE needs forecasting in Canada • The Bidder should demonstrate knowledge of assessing grid transmission readiness, distribution system, and infrastructure upgrades • The Bidder should demonstrate ability to provide EV charger deployment targets, grid infrastructure upgrade targets, and deployment strategies at a regional level | | | | | 20 | | |



| Item | Requirement | Max Points | Points awarded | Illustrated Compliance | | | | | | | | | | |
|--------|---|------------|----------------|------------------------|--|----|--|----|---|---|---|--|--|--|
| | <ul style="list-style-type: none"> The Bidder should demonstrate ability to provide forward market intelligence (a list of available and anticipated charging technologies and forward prices) an identify assumptions, uncertainties, trends, considerations <table border="1" data-bbox="292 495 1723 1393"> <thead> <tr> <th data-bbox="303 495 405 548">Points</th> <th data-bbox="405 495 1712 548">Condition</th> </tr> </thead> <tbody> <tr> <td data-bbox="303 548 405 781">20</td> <td data-bbox="405 548 1712 781"> Exceptional: <ul style="list-style-type: none"> Proposal provides a <u>complete and thorough</u> methodology that addresses all objectives in the Statement of Work under SW.3.0; proposal text is clear, supported with concise detail, and easily understood and proposes ideas that are very well developed; and proposal's content is relevant and engaging. </td> </tr> <tr> <td data-bbox="303 781 405 982">16</td> <td data-bbox="405 781 1712 982"> Strong: <ul style="list-style-type: none"> Proposal provides a <u>complete and thorough</u> methodology that addresses all objectives in the Statement of Work under SW.3.0; proposal text is clear, easily understood and proposes ideas that are well developed; and proposal's content is relevant. </td> </tr> <tr> <td data-bbox="303 982 405 1177">12</td> <td data-bbox="405 982 1712 1177"> Moderate: <ul style="list-style-type: none"> Proposal provides a <u>good</u> methodology to address the objectives in the Statement of Work under SW.3.0.; proposal will realistically deliver the project's objectives with acceptable quality and minor adjustments; proposal is generally clear and understood; and proposal has one or less major deficiency and expresses well developed ideas. </td> </tr> <tr> <td data-bbox="303 1177 405 1393">8</td> <td data-bbox="405 1177 1712 1393"> Limited: <ul style="list-style-type: none"> Proposal provides a <u>satisfactory</u> methodology to address the objectives in the Statement of Work under SW.3.0.; proposal requires minor adjustments to realistically deliver the project's objectives with acceptable quality; proposal is, for the most part, clear and understood; and proposal has a few major deficiencies and expresses well developed ideas. </td> </tr> </tbody> </table> | Points | Condition | 20 | Exceptional: <ul style="list-style-type: none"> Proposal provides a <u>complete and thorough</u> methodology that addresses all objectives in the Statement of Work under SW.3.0; proposal text is clear, supported with concise detail, and easily understood and proposes ideas that are very well developed; and proposal's content is relevant and engaging. | 16 | Strong: <ul style="list-style-type: none"> Proposal provides a <u>complete and thorough</u> methodology that addresses all objectives in the Statement of Work under SW.3.0; proposal text is clear, easily understood and proposes ideas that are well developed; and proposal's content is relevant. | 12 | Moderate: <ul style="list-style-type: none"> Proposal provides a <u>good</u> methodology to address the objectives in the Statement of Work under SW.3.0.; proposal will realistically deliver the project's objectives with acceptable quality and minor adjustments; proposal is generally clear and understood; and proposal has one or less major deficiency and expresses well developed ideas. | 8 | Limited: <ul style="list-style-type: none"> Proposal provides a <u>satisfactory</u> methodology to address the objectives in the Statement of Work under SW.3.0.; proposal requires minor adjustments to realistically deliver the project's objectives with acceptable quality; proposal is, for the most part, clear and understood; and proposal has a few major deficiencies and expresses well developed ideas. | | | |
| Points | Condition | | | | | | | | | | | | | |
| 20 | Exceptional: <ul style="list-style-type: none"> Proposal provides a <u>complete and thorough</u> methodology that addresses all objectives in the Statement of Work under SW.3.0; proposal text is clear, supported with concise detail, and easily understood and proposes ideas that are very well developed; and proposal's content is relevant and engaging. | | | | | | | | | | | | | |
| 16 | Strong: <ul style="list-style-type: none"> Proposal provides a <u>complete and thorough</u> methodology that addresses all objectives in the Statement of Work under SW.3.0; proposal text is clear, easily understood and proposes ideas that are well developed; and proposal's content is relevant. | | | | | | | | | | | | | |
| 12 | Moderate: <ul style="list-style-type: none"> Proposal provides a <u>good</u> methodology to address the objectives in the Statement of Work under SW.3.0.; proposal will realistically deliver the project's objectives with acceptable quality and minor adjustments; proposal is generally clear and understood; and proposal has one or less major deficiency and expresses well developed ideas. | | | | | | | | | | | | | |
| 8 | Limited: <ul style="list-style-type: none"> Proposal provides a <u>satisfactory</u> methodology to address the objectives in the Statement of Work under SW.3.0.; proposal requires minor adjustments to realistically deliver the project's objectives with acceptable quality; proposal is, for the most part, clear and understood; and proposal has a few major deficiencies and expresses well developed ideas. | | | | | | | | | | | | | |



| Item | Requirement | Max Points | Points awarded | Illustrated Compliance | | | | | | | | | | |
|-----------|--|------------|----------------|------------------------|--|----|--|---|---|---|--|-----------|--|--|
| | <p>4</p> <p>Insufficient:</p> <ul style="list-style-type: none"> • Proposal’s methodology and data sources are <u>unsatisfactory</u> or will address one (1) or fewer of the non-bonus objectives in the Statement of Work under SW.3.0.; • proposal requires major adjustments to realistically deliver the project’s objectives with acceptable quality; and • proposal is confusing, unclear, or ambiguous. | | | | | | | | | | | | | |
| | <p>0</p> <p>The information provided does not meet the criteria.</p> | | | | | | | | | | | | | |
| R3 | <p><u>PROJECT TEAM EXPERIENCE</u></p> <p>The proposal indicates the cumulative years of experience analyzing electric vehicle charging infrastructure needs forecasting in Canada held by Bidder’s project team. The proposal should identify how the previous work experience of project team members relates to the content expectations of this study as outlined in the Statement of Work.</p> <table border="1"> <thead> <tr> <th>Points</th> <th>Condition</th> </tr> </thead> <tbody> <tr> <td>15</td> <td>Project team members have cumulative years of experience totaling <u>more</u> than 120 months related to electric vehicle charging infrastructure needs forecasting in Canada.</td> </tr> <tr> <td>12</td> <td>Project team members have a cumulative average of experience totaling between 96 months to 119 months (inclusive) related to electric vehicle charging infrastructure needs forecasting in Canada.</td> </tr> <tr> <td>9</td> <td>Project team members have a cumulative average of experience totaling between 25 months to 95 months (inclusive) related to electric vehicle charging infrastructure needs forecasting in Canada.</td> </tr> <tr> <td>6</td> <td>Project team members have a cumulative average of experience totaling 24 months related to electric vehicle charging infrastructure needs forecasting in Canada.</td> </tr> </tbody> </table> | Points | Condition | 15 | Project team members have cumulative years of experience totaling <u>more</u> than 120 months related to electric vehicle charging infrastructure needs forecasting in Canada. | 12 | Project team members have a cumulative average of experience totaling between 96 months to 119 months (inclusive) related to electric vehicle charging infrastructure needs forecasting in Canada. | 9 | Project team members have a cumulative average of experience totaling between 25 months to 95 months (inclusive) related to electric vehicle charging infrastructure needs forecasting in Canada. | 6 | Project team members have a cumulative average of experience totaling 24 months related to electric vehicle charging infrastructure needs forecasting in Canada. | 15 | | |
| Points | Condition | | | | | | | | | | | | | |
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| R4 | <u>RISK IDENTIFICATION AND PROPOSED MITIGATION</u> | 10 | | | | | | | | | | | | |



| Item | Requirement | Max Points | Points awarded | Illustrated Compliance | | | | | | | | | | | | |
|--------|---|------------|----------------|------------------------|---|---|--|---|--|---|--|---|---|--|--|--|
| | <p>Describe all potential risks to the Project and/or circumstances that may negatively affect the successful delivery, or cause delays of the Project objectives. List mitigation strategies for addressing the risks identified, should they occur. (Failure to list any potential risks results in a 0, as no Project is without a certain level of risk.)</p> <p>This criterion will be evaluated based on how well the applicant described the project risks (are all key risks well defined and explained) and on the relevance and appropriateness of proposed risk mitigation strategies</p> <table border="1" data-bbox="292 526 1475 948"> <thead> <tr> <th>Points</th> <th>Condition</th> </tr> </thead> <tbody> <tr> <td>10</td> <td>EXCELLENT Strong, credible, supported and/or demonstrated.</td> </tr> <tr> <td>8</td> <td>VERY GOOD Adequate, credible, somewhat supported.</td> </tr> <tr> <td>6</td> <td>GOOD Some deficiencies, not of major concern, credible, somewhat supported.</td> </tr> <tr> <td>4</td> <td>WEAK Major deficiencies, some problems, somewhat credible, not supported.</td> </tr> <tr> <td>0</td> <td>POOR Many deficiencies, major problems, not credible, not supported.</td> </tr> </tbody> </table> | Points | Condition | 10 | EXCELLENT Strong, credible, supported and/or demonstrated. | 8 | VERY GOOD Adequate, credible, somewhat supported. | 6 | GOOD Some deficiencies, not of major concern, credible, somewhat supported. | 4 | WEAK Major deficiencies, some problems, somewhat credible, not supported. | 0 | POOR Many deficiencies, major problems, not credible, not supported. | | | |
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| R5 | <p>Diversity</p> <p>The Bidders should demonstrate the following corporate activities they have implemented to promote anti-racism and diversity within their organisation:</p> <ol style="list-style-type: none"> The bidder has internally published policies or commitments on anti-racism and inclusiveness; The bidder has publicly available organisational commitments to a diverse workforce; The bidder's employees are mandated to take mandatory training on anti-racism The bidder's employees are mandated to take unconscious bias training; The bidder has developed internal staffing and/or recruitment strategy(ies) to increase representation of underrepresented groups in their workforce. <p>The bidder should provide details of the following activities.</p> | 10 | | | | | | | | | | | | | | |



| Item | Requirement | Max Points | Points awarded | Illustrated Compliance | | | | |
|------|--|------------|--|------------------------|---|---|--|--|
| | <p>For activities described in a. and b. (policy and commitments), the bidder should provide copies of policy or commitment documents including their effective date.</p> <p>For activities described in c. and d. (training), the bidder should provide the name of the course and the service provider; if developed internally, a copy of the course outline.</p> <p>For activities described in e. (staffing), the bidder should provide copies of job posting, or other staffing/recruitment documents demonstrating compliance with the rated criteria.</p> <p>Maximum 2 points for each activity addressed. 0 pts for each activity not addressed.</p> | | | | | | | |
| R6 | <p><u>BREADTH OF CLIENTELE</u></p> <p>The Bidder has provided professional services to the following stakeholders within the last 60 months:</p> <ul style="list-style-type: none"> • Governments (municipal, provincial, or federal); • Automotive or automotive parts manufacturers; • Electric utilities; • Residential or commercial real-estate managers or developers; • Charging equipment manufacturers; • Engineering and advisory firms; or • Academics, non-profits, or Indigenous groups. <p>To demonstrate professional services, a project manager/lead may submit a curriculum vitae, professional references and citations to studies, articles, and public presentations.</p> <table border="1" data-bbox="325 1271 1723 1395"> <tr> <td data-bbox="325 1271 438 1333">5</td> <td data-bbox="438 1271 1723 1333">The Bidder has provided professional services for six (6) or more stakeholders</td> </tr> <tr> <td data-bbox="325 1333 438 1395">4</td> <td data-bbox="438 1333 1723 1395">The Bidder has provided professional services for five (5) stakeholders</td> </tr> </table> | 5 | The Bidder has provided professional services for six (6) or more stakeholders | 4 | The Bidder has provided professional services for five (5) stakeholders | 5 | | |
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| Item | Requirement | Max Points | Points awarded | Illustrated Compliance | | | | | | | | |
|--|---|---------------|--|------------------------|--|---|--|---|--|----------|--|--|
| | <table border="1"> <tr> <td>3</td> <td>The Bidder has provided professional services for four (4) stakeholders</td> </tr> <tr> <td>2</td> <td>The Bidder has provided professional services for three (3) stakeholders</td> </tr> <tr> <td>1</td> <td>The Bidder has provided professional services for two (2) stakeholders</td> </tr> </table> | 3 | The Bidder has provided professional services for four (4) stakeholders | 2 | The Bidder has provided professional services for three (3) stakeholders | 1 | The Bidder has provided professional services for two (2) stakeholders | | | | | |
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| 2 | The Bidder has provided professional services for three (3) stakeholders | | | | | | | | | | | |
| 1 | The Bidder has provided professional services for two (2) stakeholders | | | | | | | | | | | |
| R7 | <p><u>QUALITY OF THE PROPOSAL</u></p> <p>The proposal is written and organized in a clear and concise manner and is easily understood.</p> <p>Points Condition</p> <table border="1"> <tr> <td>5</td> <td>Excellent: free from all errors, demonstrates excellent sentence structure and a clear and concise narrative.</td> </tr> <tr> <td>4</td> <td>Good: free from all errors but sentence structure could be improved</td> </tr> <tr> <td>2</td> <td>Fair: free from most errors.</td> </tr> <tr> <td>0</td> <td>Poor: errors distract from the quality of the work.</td> </tr> </table> | 5 | Excellent: free from all errors, demonstrates excellent sentence structure and a clear and concise narrative. | 4 | Good: free from all errors but sentence structure could be improved | 2 | Fair: free from most errors. | 0 | Poor: errors distract from the quality of the work. | 5 | | |
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| 2 | Fair: free from most errors. | | | | | | | | | | | |
| 0 | Poor: errors distract from the quality of the work. | | | | | | | | | | | |
| Total Number of Points Needed to be Considered Compliant: | | 55 /95 | | | | | | | | | | |



APPENDIX 2 - FINANCIAL PROPOSAL FORM

1. Firm Price - Milestone Payments

Bidder tendered all-inclusive firm price to perform the work is in Canadian funds, applicable taxes excluded. Any Travel and Living Expenses and other miscellaneous expenses must be included in the firm price.

The bidder must complete the schedule below indicating the firm proposed amounts for each step according to the indicated percentages

Contract award date to March 31, 2024

| Milestone | Tasks/Activities | Deliverables | Deliverable Date | Firm Price (Applicable Taxes Excluded) |
|-----------|--|---|-----------------------------------|---|
| 1 | <p>Project Kick-Off</p> <ul style="list-style-type: none"> Kick-off meeting to prioritize the objectives and priorities of NRCan Review the methodology and research questions Review timelines and milestones | Meeting Minutes (MS Word or PDF). | 1 week after the contract award | |
| 2 | <p>Research and Fact-finding/Data Gathering</p> <p>Data plan includes intended sources, risks, risk mitigation, and contingency plans with methodology change impacts should some data ultimately not be available.</p> | White paper on research methodology and data plan (MS Word or PDF). | To be completed by March 27, 2023 | \$ _____ 10% |
| 3 | <p>Stakeholder Interviews</p> <p>This should include interviews with governments, charger manufacturers, network operators, EV owner groups, utilities, research organizations and various representatives from PTs and municipalities</p> | List of interview questions and interviewees (MS Word or PDF) | March 27, 2023 | \$ _____ (10%) |



| Milestone | Tasks/Activities | Deliverables | Deliverable Date | Firm Price (Applicable Taxes Excluded) |
|-----------|--|---|--------------------|---|
| | that will provide insights into their infrastructure needs. | | | |
| 4 | <p>Modelling of EVSE and Grid Infrastructure Needs – reflecting Task 1 - 8</p> <p>This must include EVSE forecasts per year up to 2040; number of chargers, types (Level 2 and DCFC), location (public/workplace MURB), number per province and territory, and ratio of EVs to charger. Must also include grid infrastructure (transmission, distribution, and upgrade) assessment and forecasts Note: Beyond 2030, recommendations should be done with careful consideration since battery and infrastructure technology evolves quickly and will certainly have an impact on the forecast elements above</p> <p>Forecasts must include at least two scenarios with one scenario that follows the projected ZEV uptake under the federal ZEV sales targets, as expressed in the 2022 federal Emissions Reduction Plan for 2030.</p> | Output tables in MS Excel with all graphs developed. Output to be integrated into report as well. | September 30, 2023 | \$ _____ (20%) |
| 5 | <p>Reporting Requirement 1</p> <p>A report will summarize the findings and will include an overview of infrastructure needs and methodologies used</p> | Draft Report for review and comment from the Project Authority (MS Word or PDF) | November 1, 2023 | \$ _____ 20% |



| Milestone | Tasks/Activities | Deliverables | Deliverable Date | Firm Price (Applicable Taxes Excluded) |
|--|--|-------------------------------|-------------------|---|
| 6 | Reporting Requirement 2 Final report that reflects changes and edits requested by Project Authority. | Final Report (MS Word or PDF) | December 15, 2023 | \$ _____ 40% |
| Total Firm Price for Financial Proposal Evaluation: | | | | \$ _____ |