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**Department of Foreign Affairs, Trade and
Development (DFATD)**

Ministère des Affaires étrangères, commerce et
développement (MAECD)

Request for Proposal

Demande de proposition

proposal to: Department of Foreign Affairs Trade
and Development.

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

Proposition à: Ministère des Affaires
Étrangères, commerce et développement
Nous offrons par la présente de vendre à Sa
Majesté la Reine du chef du Canada, aux
conditions énoncées ou incluses par référence
dans la présente et aux appendices ci-jointes,
les biens, services et construction énumérés ici
sur toute feuille ci-annexée, au(x) prix
indiqué(s).

Comments — Commentaires:

**THIS DOCUMENT CONTAINS A SECURITY
REQUIREMENT — LE PRÉSENT DOCUMENT
COMPORTE UNE EXIGENCE EN MATIÈRE DE
SÉCURITÉ**

Issuing Office – Bureau de distribution

Foreign Affairs, Trade and Development / Affaires
étrangères, commerce et développement
It Contracting Services Unit / Unité des services de
contrats TI
200 Promenade du Portage,
Gatineau, QC

Title — Sujet: SaaS Omnichannel Communication Platform	
Solicitation No. - N° de l'invitation 22-222062 AMD005	Date: May 09, 2023
Solicitation Closes - L'invitation prend fin	Time Zone —Fuseau horaire
At /à: 2:00 PM On / le May 15, 2023	EDT (Eastern Daylight Saving Time)
F.O.B. — F.A.B.	
Plant-Usine: <input type="checkbox"/> Destination: X Other — Autre: <input type="checkbox"/>	
Address Enquiries to — Addresser toutes questions à: Name : Stephen Brown E-Mail : Stephen.Brown@international.gc.ca	
Telephone No. – No de téléphone: (343) 203-1305	FAX No. – No de télécopieur :
Destination of Goods and or Services/Destination – des biens et ou services: Department of Foreign Affairs, Trade and Development (DFATD)/ Ministère des Affaires étrangères, commerce et développement (MAECD)	
Vendor/Firm Name and Address — Raison sociale et adresse du fournisseur/de l'entrepreneur:	
Telephone No. – No de téléphone:	FAX No. – No de télécopieur:
Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) — Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature	Date

This amendment 005 is raised to answer questions and Amend the RFP and extend the solicitation closing date to May 15, 2023. Amendment 004 Solicitation Notice contained attachment titled Amendment 003 which was left out of the previous solicitation notice.

Questions and Answers

#	Bidder's Question	DFATD Answers
1	Vendor raised question regarding closing date. Closing date was incorrect when posted. It should be April, 10, 2023 not March 10, 2023.	DFATD changed the closing date from March 10, 2023 to April 10, 2023 – AMD001 raised
2	<p>“Please refer to Annex “A” Statement of Work Section 4 (Exclusion).</p> <p>Incoming voice calls routed through the Global Affairs Canada PBX system will not be processed through the omnichannel communications platform. However, the omnichannel communications platform should be able to handle voice communications routed through a chat app.</p> <p>Question[...]:</p> <p>The highlighted section [...](above) caught my attention. Are you able to elaborate please?</p>	DFATD has reviewed your inquiry and decides to remove this requirement from the Statement of Work. See further in this amendment for more details.
3	On page 56 of the document, under "Demonstration", it is stated that the bidder may be asked to demonstrate their system. Does this imply that the system must already be operational before the adjudication or that we must demonstrate that we have the technical capacity to implement the system according to the requirements of the tender? Thank you for clarifying this point.	DFATD confirms that the bidder may be asked to demonstrate their systems and that they have the technical capacity to implement the system according to the requirements of the tender.
4	<p>1. We are a Global, Dutch based Company that stores our Data in the MS Azure EU Cloud under the gold standard GDPR Compliance.</p> <p>2. Will this be acceptable considering GDPR Standards? We typically don't run into issues here but wanted to ask.</p> <p>3. If submitting with a Canadian entity is a must?</p> <p>4. If having SOC 2 Type II is a K/O criterion?</p>	<p>1+2): As per M3, and as per the IT requirement, data must be stored in Canada.</p> <p>3) As per Free Trade Agreements, the bidding proponent does not need to be a Canadian entity.</p> <p>4) As per M4, SOC2 Type II is mandatory.</p>

<p>5 a) Does Global Affairs Canada have a link for the opportunity where we can access the rest of documents, e.g. TBS Playbook for SaaS Applications.</p> <p>b) Does Global Affairs Canada have an idea when is the target implementation date?</p> <p>c) OMNI channel – Here is our definition: The CCC Omni-channel solution integrates multiple communication channels into a single platform, allowing contact center agents to manage all customer interactions from a centralized location. CCC can provides communication channels including voice, email, and chat (Live Web, Web AI Bot, SMS, Email, WhatsApp). CCC agents will be able to accept an interaction through any channel on a single interface. AI chatbot (natural language) capabilities exist only on web chat interactions. Does this meet Global Affairs Canada omni-channel requirements?</p> <p>d) Can Global Affairs Canada provides additional detail around the Metered services Toll Free and Long Distance and how they can be included in the rating and Bases of Payment?</p> <p>e) Annex A Section 4 Exclusions, could Global Affairs Canada clarify “the omnichannel communications platform should be able to handle voice communications routed through a Chat app.” Is this a reference to an inbound Chat being converted into a voice call if either the caller or the agent requires it?</p> <p>f) Can Global Affairs Canada provide volumetric estimates in regard to the storage including any requirements for any Audio or screen recording? Further can this be added to the scoring rating and addressed in the Bases of Payment?</p> <p>g) How many project summaries/references are required?</p> <p>h) Does Global Affairs Canada have any specific reporting requirements?</p> <p>i) Does Global Affairs Canada have any specific requirement for Workforce Management?</p> <p>j) Would Global Affairs Canada please add a consultant rate for Professional Services into the pricing matrix. It</p>	<p>a) The TBS playbook for Government of Canada information systems in cloud environments is located at: https://www.canada.ca/en/government/system/digital-government/digital-government-innovations/cloud-services/security-playbook-information-system-solutions-cloud.html.</p> <p>b) The target implementation date will be as soon as possible following the award of the contract.</p> <p>c) As per the statement of work, the online platform must have capability to deploy artificial intelligence / machine learning tools, such as chat bots, that integrate with all communications channels.</p> <p>d) As per Annex B, the Bidder’s Monthly fee is to include all requirements as stated in the Statement of Work for up to 30 concurrent users including unlimited communications using all communications channels</p> <p>e) See Question 2</p> <p>f) DFATD is unable to provide an estimated volume of data that will be produced in the future. However, according to the incumbent, approximately 500mb of data was used over the last 12 months.</p> <p>g) DFATD does not request project summaries and references to project summaries are included in error. See further in this amendment for more details.</p> <p>h) DFATD would like reporting capabilities as a part of the Omnichannel solution. At a minimum, the solution should be able to provide reporting for volume by channel and by employee for a specified period of time, as well as average and peak wait times. The solution should also be able to report on the chatbot’s activities.</p> <p>i) No</p> <p>j) As per Annex B, the Bidder’s Monthly fee is to include all requirements as</p>
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	is our experience that this would benefit GAC post implementation.	stated in the Statement of Work for up to 30 concurrent users including unlimited communications using all communications channels and Training for up to 30 users in the full use of the platform.
6	<p>a) What is the preferred template you'd like vendors to use to respond to this RFP?</p> <p>b) What is the expected annual volume across all channels? Even understanding the order of magnitude (100s/month, 1000s/month, 10,000s/month) would be helpful. We understand enquiries to the EWRC can exceed 500 enquiries / hour but it's not clear if that's an average or an indication of what peak volume can look like. More detail here will allow everyone to more accurately complete the financial bid.</p>	<p>a) Instructions for responding to the solicitation are found in Part 1 through 6 of the RFP, and in particular, Part 2.</p> <p>b) We cannot provide an estimated volume for the duration of the contract. During the pilot, the volume averaged 100s per day, but peak volumes during an international crisis could be significantly higher.</p>
7	<ul style="list-style-type: none"> • Will GAF execute a special non-disclosure agreement to receive [...] reports as applicable to this opportunity? • Will GAF accept third-party attestation as satisfactory evidence of relevant information security controls, per guidance described in (without limitation) TBoCS Security Policy Implementation Note SPIN#2017-01? • Would GAC please advise us what personnel Government of Canada security levels are expected for this project? 	<ul style="list-style-type: none"> • If requested, GAC can provide a non-disclosure or attest to receive these reports. • Yes, third-party attestations can serve to increase confidence and assurance of the contractor's information system security posture. Each attestation will be carefully assessed and considered for its validity and relevance. • Security requirements are found in Part 6, part 7, annex C, and annex D of the RFP.
8	<p>The RFP documentation requires that we send three different emails, Technical Bid, Financial Bid, and Certifications. However, there are some yes and no question in the RFP, where would we send these too, please see below:</p> <p>Examples:</p> <ol style="list-style-type: none"> 1. -The section around certification, to confirm you are looking for us to send ISO 27001, SOC 2 and fill out the Integration Declaration Form, and submit it all of this in a separate email titled Certifications? 2. Regarding the Integration Declaration form under Certificates, if we have not been charged or convicted of an offence, does the declaration still need to be completed if non of the circumstances apply? We want to avoid triggering a review for ineligibility if we submit a blank signed copy. 3. To confirm, the security information that is listed, these will be assessed once the contract is awarded. For example, section 15 talks about Security Assessment and Authorization Phase-1 Requirements, we meet the requirements, however do we need to send these High Level Security 	<p>The bidders can provide their bid in one email and attach separate documents for Sections I, II and III as outlined in 3.1 Bid Preparation Instructions.</p> <ol style="list-style-type: none"> 1. Certifications are to be gathered and submitted in your separate attachment under Section 3.1 Bid Preparation Instructions. 2. Bidders are asked to review the link included in 5.1.1 Integrity Provisions- Declaration of Convicted Offenses. 3. Bidders are to submit the Technical Bid, Financial Bid and Certificatoinas as identified in Section 3.1 Bid Preparation Instructions.

	Designs? From my understanding it is just the Technical Bid, Financial Bid and the couple Certifications.	
9	<ol style="list-style-type: none"> 1. Why is this not being procured through an existing CCaaS contract in the federal government? 2. On pg. 24 you state, "in 2021, a pilot project was undertaken to introduce additional communications channels." What a web-based software-as-a-service platform did DFAIT pilot? 3. On pg. 45 you state "Incoming voice calls routed through the Global Affairs Canada PBX system will not be processed through the omnichannel communications platform" What PBX solution is DFAIT using today? 4. How many supervisor licenses are required? 5. What is the projected growth for year 1, 2 and 3? 6. On pg. 25 it states "Has flexible data retention and disposal framework that can be aligned with Global Affairs Canada's requirements." What are Global Affairs Canada's defined data retention requirements? 7. What are Global Affairs Canada's defined retention requirements for chat transcripts? 8. Is the Knowledge Base that DFAIT presently uses, being retired or replaced? 9. Will DFAIT or the vendor, procure the SMS long code? 10. May you please provide the Infobank document #14310732 referenced in section 3.1? 	<ol style="list-style-type: none"> 1. Procurement Identification Number K000017662 is for a Contact Center as a Service (CCaaS) and this Supply Arrangement is not in scope with the DFATD requirement. 2. Comm100 3. DFATD confirms that there are no requirements to integrate with the PBX system. 4. DFATD would like to have the ability to change any user's role to a supervisor throughout the duration of the contract. 5. The RFP accurately states the number of licenses required for the duration of the contract, including optional years. Global Affairs Canada requires a data retention period of 10 years. 6. Global Affairs Canada requires a data retention period of 10 years for all of the data stored on the omnichannel communication solution. 7. With the assistance from the vendor, DFATD will integrate their current knowledge base into the successful bidder's solution. 8. DFATD currently uses numbers procured through Twilio and requires the integration of these numbers with the omnichannel communications platform. 9. Please refer to amendment C and D, removing the referenced document noted below. 10. Please refer to Amendment C and D, removing the referenced document noted below.
10	<p>In Annex B on page 27, a quotation is needed from vendor for "Monthly fee to include all requirements as stated in the Statement of Work for up to 30 concurrent users including unlimited communications using all communications channels"</p> <p>Do you expect our quoted price to include the incurred</p>	DFATD does not require the omnichannel solution's quoted price to include telecommunication charges incurred by the telecommunication service providers. Currently, DFATD utilizes numbers through

	<p>telecommunication charges such as SMS and WhatsApp? Please note that telcos are charging for this based on the volume of communication. Do you have an existing deal with a specific telco?</p>	<p>Twilio and requires the continuous use of these numbers.</p>
11	<p>Is there a possibility to extend the timeline?</p>	<p>DFATD has reviewed your question and decides to extend the RFP to May 4, 2023.</p>
12	<p>1. About section 5.2.2 "Federal Contractors Program for Employment Equity - Bid Certification" on page 15... There is no "FCP Limited Eligibility to Bid" list on the following page. https://www.canada.ca/en/employment-social-development/corporate/portfolio/labour/programs/employment-equity/federal-contractors/compliance-assessment.html</p> <p>2. About SMS, WhatsApp and live chat on page 24 under section 2... a. What is the total number of incoming and outgoing SMS messages in the last 3 months? b. What is the total number of incoming and outgoing WhatsApp messages in the last 3 months? c. What is the total number of incoming and outgoing live chat messages in the last 3 months?</p> <p>3. About section 8 of Annex A on page 26... Which entity is "client project authority" on page 26 referring to?</p> <p>4. About M2 on page 51... a. Do you have all pre-approved messages documented? If yes, can these be shared with us here? If these cannot be shared for now, please share the number of pre approved messages involved. b. Do you have all automated response messages documented? If yes, can these be shared with us here? If these cannot be shared for now, please share the number of automated response messages involved. c. Do you have all message routing documented? If yes, can these be shared with us here? If these cannot be shared for now, please share one or two examples and the number of message routes involved.</p> <p>5. About M3 on page 51... it mentioned "Has flexible data retention and disposal framework that can be aligned with GAC's requirements." a. What are the GAC's requirements referring to? Please elaborate.</p> <p>6. About M3 on page 51... it mentioned "Operates with high-level availability and with data centre level redundancy."</p>	<p>1. From the link provided, "Currently, no organizations are named on the FCP Limited Eligibility to Bid List. If an organization is non-compliant with FCP requirements or withdraws without FCP permission, their name will be added to the list."</p> <p>a) SMS: DFATD received approximately 300 messages and sent approximately 250 messages from January to March of 2023. b) WhatsApp: DFATD received approximately 7,800 messages and sent approximately 3,300 messages from January to March of 2023. c) Live Chat: DFATD had approximately 4,200 chat requests from January to March of 2023.</p> <p>3. The client project authority is the Emergency Watch and Response Centre.</p> <p>4. a) DFATD has documented pre-approved messages that can be shared during the implementation phase. b) DFATD has documented automated responses that can be shared during the implementation phase. c) DFATD has documented message routing that can be shared during the implementation phase.</p> <p>5. a) Global Affairs Canada requires a data retention period of 10 years.</p> <p>6. DFATDF will delete "Operates with high-level availability and with data centre level redundancy" from M3, as the requirement is captured in M4. Please see amendment.</p>

	<p>a. By "data centre level redundancy", is it referring to a disaster recovery site in a physically different data center?</p>	
13	<p>1. The RFP documentation requires that we send three different emails, Technical Bid, Financial Bid, and Certifications. However, there are some yes and no question in the RFP, where would we send these too, please see below example:</p> <p>payable to the Canada Pension Plan Act, R.S., 1985, c. C-8.</p> <p>Former Public Servant in Receipt of a Pension</p> <p>As per the above definitions, is the Bidder a FPS in receipt of a pension? Yes</p> <p>If so, the Bidder must provide the following information, for all FPSs in receipt applicable:</p> <p>a. name of former public <u>servant</u>:</p> <p>2.The section around certification, to confirm you are looking for us to send ISO 27001, SOC 2 and fill out the Integration Declaration Form, and submit it all of this in a separate email titled Certifications?</p> <p>3.Regarding the Integration Declaration form under Certificates, if we have not been charged or convicted of an offence, does the declaration still need to be completed if non of the circumstances apply? We want to avoid triggering a review for ineligibility if we submit a blank signed copy.</p> <p>4.To confirm, the security information that is listed, these will be assessed once the contract is awarded. For example, section 15 talks about Security Assessment and Authorization Phase-1 Requirements, we meet the requirements, however do we need to send these High Level Security Designs? From my understanding it is just the Technical Bid, Financial Bit and the couple Certifications.</p>	<p>1.Bidders are to submit the Technical Bid, Financial Bid and Certificatoins as identified in Section 3.1 Bid Preparation Instructions.</p> <p>2.Certifications are to be gathered and submitted in your separate attachment under Section 3.1 Bid Preparation Instructions.</p> <p>3.Bidders are asked to review the link included in 5.1.1 Integrity Provisions-Declaration of Convicted Offenses.</p> <p>4. The successful Bidder undertakes to work with GAC Information Technology security personal to complete an internal Security Assessment and Authorization process set out in Annex D IT Security Technical Annex and in particular, to complete the documents identified in Section 14.</p>
14	<p>Can you kindly confirm that calls and video are not in the scope anymore? based on SOW part 4 "exclusions". Hence it is only texting as method of communication.</p>	<p>All communications received through one of the communication platforms such as WhatsApp, including pictures, videos and voice recordings, should be processed by the proposed solution. However, calls are not in the scope.</p>

Amendment to the RFP

A) At Attachment 4.1 Bid Evaluation Criteria Section 1.2 M3, delete the following criteria:

“Operates with high-level availability and with data centre level redundancy.”

**** ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED ****