



THIS ITQ IS FOR INDUSTRY FEEDBACK ONLY, WHEN FORMAL ITQ IS RELEASED THE CLOSING PERIOD WILL BE POPULATED WITH INDSTUCTIONS ON DATES AND TIMES

SHARED SERVICES CANADA

**Invitation to Qualify
for the Physical Infrastructure Supply Arrangement (PISA 2.0) Procurement Process
formerly known as
Server and Storage Infrastructure Supply Arrangement (SSISA)**

Invitation to Qualify No.	TBA	Date	July 14, 2023
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Closing Date and Time	Friday August 11, 2023 at 2:00 PM	
Time Zone	Eastern (EST)	
Destination of Goods/Services	Not applicable – Pre-Qualification Process Only	
Email Address for Submitting your Response by the Closing Date	dcspi-cdips@ssc-spc.gc.ca	

SHARED SERVICES CANADA

Invitation to Qualify
for the Procurement Process for
Physical Infrastructure Supply Arrangement (PISA 2.0)

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SHARED SERVICES CANADA

Invitation to Qualify for the Procurement Process for Physical Infrastructure Supply Arrangement (PISA 2.0)

1. General Information

1.1 Introduction

- i) **Phase 1 of Procurement Process:** This Invitation to Qualify (ITQ) is the first phase of a procurement process by Shared Services Canada (SSC) for Physical Infrastructure Supply Arrangement (PISA 2.0) (the “**Project**”). Suppliers are invited to pre-qualify in accordance with the terms and conditions of this ITQ in order to become “**Qualified Respondents**” for any later phases of the procurement process. Only Qualified Respondents will be permitted to bid on any subsequent solicitation issued as part of the procurement process.
- ii) **ITQ is not a Bid Solicitation:** This ITQ process is not a solicitation of bids or tenders. No contract will be awarded as a result of the activities during the ITQ phase. Canada reserves the right to cancel any of the preliminary requirements included as part of the Project at any time during the ITQ phase or any other phase of the procurement process. Given that the ITQ process may be partially or completely cancelled by Canada, it may not result in any of the subsequent procurement processes described in this document. Respondents and Qualified Respondents may withdraw from the procurement process at any time. Therefore, suppliers who submit a response can choose not to bid on any subsequent solicitation.

1.2 Overview of the Project

- i) The anticipated ITQ requirements consist of the delivery of physical infrastructure related to data centre servers and storage. SSC will continue to pursue setting standards to meet its business needs for the forthcoming supply arrangements in conjunction with input from industry to ensure such standards are supportable and sustainable. Standards set forth in the supply arrangements and any other contracts resulting from this procurement process will encourage an open and inter-operable environment.
- ii) The requirement is summarized in with a complete description of the individual categories and a responsibility matrix available in Section 1.22 (Procurement Strategy) and Section 1.23 (Responsibility matrix). SSC will finalize the structure of the Categories, and possible sub-categories within each Category, during the Review and Refine Requirements Phase.
- iii) SSC will assess each response that it receives to determine in its sole discretion whether the respondent sufficiently meets all the requirements. SSC reserves the right to request additional information to aid in its assessment.
- iv) Any ITQ response that SSC deems to not include sufficient detail in allowing SSC to assess a vendor’s compliancy may be removed from consideration at SSC’s sole discretion.

1.21 Scope of Anticipated Procurement:

- i) **Potential Client Users:** This ITQ is being issued by SSC. It is intended that the Supply Arrangement resulting from any subsequent solicitation would be used by SSC to provide shared services to one or more of its clients. SSC’s clients include SSC itself, those government institutions for whom SSC’s services are mandatory at any point during the life of any resulting instrument(s), and those other organizations for whom SSC’s services are optional at any point during the life of any resulting instrument(s) and that choose to use those services from time to time. This process will not preclude SSC from using another method of supply for any of its clients with the same or similar needs, unless a subsequent solicitation for this Project expressly indicates otherwise.
- ii) **Number of Supply Arrangement:** SSC is currently contemplating the award of multiple Supply Arrangements.
- iii) **Term of Supply Arrangement:** SSC is currently contemplating an ongoing Supply Arrangement however may re-initiate the process yearly to allow new SA holders. The re-issuance is not expected to affect existing SA holders. If SSC determines a vendor no longer qualifies to hold a SA, SSC will address the cancelation of that SA via an independent process.

1.22 Procurement Strategy

SSC’s procurement strategy for the Supply Arrangement is currently based on vendors being qualified on the following commodity categories. In addition, the new extended warranty may be included in each category.

1.0 Servers		
1.0	Servers	Subcategories, including but not limited to: <ul style="list-style-type: none"> a) X86 Server - covering at a minimum the following physical elements: <ul style="list-style-type: none"> i) Multiple classes of standalone servers ii) maintenance, support, break/fix, firmware update, patch management, etc. b) UNIX or non-X86 Servers <ul style="list-style-type: none"> i) Multiple classes of standalone servers ii) Services such as <ul style="list-style-type: none"> (1) maintenance, support, break/fix, firmware update, patch management, etc. (2) decommissioning

2.0	Storage and Back-up	<p>a) Storage - Storage Hardware”, i.e. Block based system, Network Attached Storage, Tape Library, Storage appliances such as Data Domains and virtual tape libraries (i.e smart backup appliances), Software solutions such as hyperconverged storage and Object storage.</p> <p>a) Storage fabric i.e. Fiber Channel, NVME over FC, and InfiniBand</p> <p>b) Services such as:</p> <ol style="list-style-type: none"> 1. maintenance, support, break/fix, firmware update, patch management, etc. 2. decommissioning
3.0	Converged Infrastructure	<p>Combination of computing, storage, networking, and virtualization resources into a pre-integrated, vendor-validated system</p> <ol style="list-style-type: none"> (1) x86 Converged System <ol style="list-style-type: none"> (a) Infrastructure built using x86-based hardware (2) Hyper Converged System <ol style="list-style-type: none"> (a) Single, tightly integrated platform
4.0	Appliances	<p>a) Purpose-built devices/server</p> <p>b) Physical or virtual</p> <p>Platform Appliances: For example but not limited to Oracle, SAP HANA, etc. Netezza, SAP Hana, IBM MQ</p>

1.23 Responsibility Matrix

This Responsibility Matrix identifies the responsible party (SSC or Vendor) for the following Sub-Categories: ownership, ordering, and installation and life cycle functions.

	Solution lifecycle	
	SSC	Vendor
Ownership		
Infrastructure Hardware	X	
Software Licenses and Virtual Server Instances	X	
Data Assets	X	
Product Requirements	X	
Product Specifications		X
Ordering		
Infrastructure Hardware	X	
Software Licenses and Virtual Server Instances	X	

Installation		
Infrastructure Hardware		X
Software Licenses and Virtual Server Instances	X	
Configuration of Software Licenses and Virtual Server Instances		X
Life Cycle		
Provisioning	X	
Capacity Planning	X	X
Break/Fix		X
Maintenance		X
Decommissioning	X	

1.3 Overview of Anticipated Procurement Process

This ITQ is the first phase in the procurement process for the Project. Although the procurement process remains subject to change (and even to cancellation, in accordance with SSC's Standard Instructions), Canada currently anticipates that the procurement process will be conducted in the following phases:

- a) **ITQ Phase:** This ITQ will be used to qualify Respondents to participate in any subsequent phases of the procurement process.
- b) **Review and Refine Requirements (RRR) Phase:** The RRR process with the Qualified Respondents will follow the ITQ phase. The objective of the RRR phase is to obtain feedback from Qualified Respondents on Canada's preliminary requirements for the Project. It is intended to be a collaborative process and may involve interactions such as workshops, one-on-one sessions, and written questions and answers. Canada will consider the feedback provided by Qualified Respondents when refining the requirements and preparing its procurement documents for the Project. Further details regarding the RRR phase will be provided to those Respondents who qualify as a result of this ITQ phase.
- c) **Request for Supply Arrangements (RFSA) Phase:** Canada anticipates releasing an RFSA to those Qualified Respondents who remain qualified at the time the RFSA is released.
- d) **SCSI Assessment:** Qualified respondents will be required to submit "Supply Chain Security Information" (SCSI) for assessment by government of Canada in relation to supply chain integrity. Further details regarding the SCSI Assessment will be provided to Qualified Respondents at a later phase.
- e) Shared Services Canada considers that the ultimate value realized from a procurement contract can be enhanced by exceptional performance or alternatively can be undermined by poor performance. The Contractor acknowledges that Shared Service Canada, as a customer, may track the performance of its suppliers and that this information may be considered by Shared Services Canada in decisions about the suppliers best suited to perform other work in the future. Shared Services Canada confirms that, in any competitive procurement process, the way in which past performance may be used in the evaluation of bids will be described in the solicitation.

2. Instructions for Respondents

2.1 Standard Instructions, Clauses and Conditions

- a) SSC's Standard Instructions for Procurement Documents No. 1.4 ("**SSC's Standard Instructions**") are incorporated by reference into and form part of the ITQ as though they were expressly set out here in full. If there is a conflict between the provisions of SSC's

Standard Instructions and this document, this document prevails. SSC's Standard Instructions are available from the Contracting Officer.

- b) All other instructions, clauses and conditions identified in this document or any of its attachments 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>) issued by Public Works and Government Services Canada. These instructions, clauses and conditions are incorporated by reference and they form part of this document as though they were expressly set out here in full.
- c) If there is a conflict between the provisions of this document and any documents that are incorporated into it by reference as set out above, this document prevails.
- d) With respect to SSC's Standard Instructions:
 - i) There will [not] be a conference for interested suppliers.
 - ii) There will [not] be a site visit.
- e) By submitting a response, the Respondent is confirming that it agrees to be bound by all the instructions, clauses and conditions of the ITQ.

2.2 Questions and Comments *(THIS ITQ IS FOR INDUSTRY FEEDBACK WHEN FORMAL ITQ IS RELEASED THE QUESTION AND ANSWER PERIOD WILL BE POPULATED WITH INDSTUCTIONS ON DATES AND TIMES)*

Questions and comments about this ITQ must be submitted to the email address identified on the cover page of the ITQ and in accordance with the Section of SSC's Standard Instructions entitled "**Communications**". However, instead of the deadline specified in those Standard Instructions, there will be two (2) question periods, as follows:

- a) First Question Period: Questions must be sent no later than *(DATE TBD)* at *(TIME TBD)*.
- b) Second Question Period: Questions should be sent no later than *TIME AND DATE TBD* on the third day following the posting of all responses to the first Q&A on CanadaBuy.

If Canada does not respond by the date and times indicated, Canada will extend the closing date by the same duration as the delay(s).

2.3 Submission of Only One Response

- a) A Respondent can be an individual, a sole proprietorship, a corporation, a partnership, or a joint venture.
- b) Each Respondent (including related entities) will be permitted to qualify only once. If a Respondent or any related entities participate in more than one response (participating means being part of the Respondent, not being a subcontractor), Canada will provide those Respondents with 2 working days to identify the single response to be considered by Canada. Failure to meet this deadline may result in all the affected responses being disqualified or in Canada choosing, in its discretion, which of the responses to evaluate.
- c) For the purposes of this Article, regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law (whether that entity is an individual, corporation, partnership, etc.) an entity will be considered to be "related" to a Respondent if:

- i) they are the same legal entity as the Respondent (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
 - ii) the entity and the Respondent are “related persons” or “affiliated persons” according to the *Canada Income Tax Act*;
 - iii) the entity and the Respondent have now or in the two years before the ITQ closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
 - iv) the entity and the Respondent otherwise do not deal with one another at arm’s length, or each of them does not deal at arm’s length with the same third party.
- d) A Respondent may act as a subcontractor to another Respondent. However, subcontractors may not be permitted to participate in the Review and Refine Requirements phase with the Qualified Respondent for whom they will be doing subcontracting work.
- e) Any individual, sole proprietorship, corporation, or partnership that is a Respondent as part of a joint venture cannot submit another response on its own or as part of another joint venture.

Example 1: Supplier A does not itself have all the experience required by the ITQ. However, Supplier B has the experience that Supplier A lacks. If Supplier A and Supplier B decide to team up to submit a response together as a joint venture, both entities are together considered the Respondent. Neither Supplier A nor Supplier B can team up with another supplier to submit a separate response, because each is already part of a Respondent.

Example 2: Supplier X is a Respondent. Supplier X’s subsidiary, Supplier Y, decides to team up with Supplier Z to submit a response as a joint venture. Suppliers Y and Z, as well as Supplier X, will all be asked to determine which one of the two responses will be considered by Canada. Both responses cannot be submitted, because Supplier Y is related to Supplier X as an affiliate.

- f) By submitting a response, the Respondent is certifying that it does not consider itself to be related to any other Respondent.

2.4 Security Clearance Requirement

A preliminary version of the Security Requirements Checklist (SRCL) has been included as an annex to this ITQ. These requirements are subject to change and are provided for information purposes. However, any supplier that does not have the security clearances described in the preliminary SRCL may wish to initiate the process to ensure they meet the requirements. Any delay in the award of a contract to allow the successful bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.

3. Preparing and Submitting a Response

3.1 General Instructions

SSC’s Standard Instructions include instructions with respect to responses, which apply in addition to those described in this document.

3.2 Language for Future Communications

Each Respondent is requested to identify, in its Response Submission Form, which of Canada’s two official languages it chooses to use for future communications with Canada regarding this ITQ and any subsequent phases of the procurement process.

3.3 Content of Response

A complete response to this ITQ consists of all of the following:

- a) **Response Submission Form (Requested at ITQ Closing):** Respondents are requested to include the Response Submission Form with their responses. It provides a common form in which Respondents can provide information required for evaluation, such as a contact name, the Respondent’s Procurement Business Number, the language for future communications with Canada about this procurement process, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information requested by the Response Submission Form is incomplete or requires correction, Canada will provide the Respondent with an opportunity to provide the additional information or make the correction. Providing the information when requested during the evaluation period is mandatory.
- b) **Specific Responses to the Qualification Requirements at Annex A (Mandatory at ITQ Closing):** The response must include all the information required by Annex A.
- c) **Certifications (Requested at ITQ Closing):**
 - i) By submitting a response, the Respondent is automatically providing the certifications identified below as required. The content of each certification is set out in SSC’s Standard Instructions in the section entitled “**Deemed Certifications from Each Bidder**”:

Equipment and Software is “Off-the-Shelf”	required
System is “Off-the-Shelf”	required

- ii) If the table below indicates that a certification is required, the Respondent is required to provide the following certifications described in SSC’s Standard Instructions. Although all these certifications are requested at ITQ closing, if Canada determines that any certification is missing, incomplete or requires correction, Canada will provide the Respondent with an opportunity to provide the required information. Providing the certification when requested during the evaluation period is mandatory.

Federal Contractors Program for Employment Equity Certification	Required – please provide the information in the Response Submission Form
Former Public Servants Certification	Required – please provide the information in the Response Submission Form
Regulatory Certifications set out in Regulatory Forms A, B, C and D of SSC’s Standard Instructions	Not required

Respondents should note that certain certifications that are not required at the ITQ stage may be required at a later stage of the procurement process.

3.4 Electronic Submission of Response

- a) **Email Submission of Response:** Subject to Subsection (j), Respondents must submit their responses by email in accordance with this Section by the date and time of closing to the email address identified on the cover page of this document as the “Email Address for Response Submission”.
- b) **Format of Email Attachments:** The approved formats for email attachments are any combination of:
 - i) PDF attachments; and
 - ii) documents that can be opened with either Microsoft Word or Microsoft Excel.Respondents that submit attachments in other formats do so at their own risk.
- c) **Email Size:** Respondents should ensure that they submit their response in multiple emails if any single email, including attachments, will exceed 15 MB. Except as expressly provided below, only emails that are received at the Email Address for Response Submission by the closing date and time will be considered part of the response.
- d) **Email Title:** Respondents are requested to include the ITQ No. identified on the cover page of this document in the “subject” line of each email forming part of the response.
- e) **Time of Receipt:** All emails received at the Email Address for Response Submission showing a “received” time before the response closing date and time will be considered timely. In the case of a dispute regarding the time at which an email arrived at SSC, the time at which the response is received by SSC will be determined:
 - i) by the delivery time stamp received by the Respondent if the Respondent has turned on Delivery Status Notification for the sent email in accordance with RFC 1891 established by the Internet Engineering Steering Group (SMTP Service Extension for Delivery Status Notification); or
 - ii) in accordance with the date and time stamp on the SMTP headers showing the time of first arrival on a server used to provide the Government of Canada with email services, if the Respondent has not turned on Delivery Status Notification for the sent email.
- f) **Availability of Contracting Authority:** During the two hours leading up to the closing date and time, an SSC representative will monitor the Email Address for Response Submission and will be available by telephone at the Contracting Authority’s telephone number shown on the cover page of this document (although the SSC representative may not be the Contracting Authority). If the Respondent is experiencing difficulties transmitting the email to the Email Address for Response Submission, the Respondent should contact SSC immediately at the Contracting Authority’s coordinates provided on the cover page of this document.
- g) **Email Acknowledgement of Receipt by SSC:** On the closing date, an SSC representative will send an email acknowledging receipt of each response (and each email forming part of that response, if multiple emails are received) that was received by the closing date and time at SSC’s Email Address for Response Submission.
- h) **Delayed Email Bids:** SSC will accept an email response received in the first 24 hours after the closing date and time only if the Respondent can demonstrate that any delay in delivering the email to the SSC Email Address for Response Submission is due to Canada’s systems. Responses received by email more than 24 hours after the closing date and time will not be accepted under any circumstances. As a result, Respondents who have tried to submit a response, but have not received an email acknowledging receipt from SSC shortly

thereafter should contact the Contracting Authority so that they can determine whether or not the response arrived at the SSC Email Address for Response Submission on time.

- i) **Responsibility for Technical Problems:** Canada will not be responsible for:
 - i) any technical problems experienced by the Respondent in submitting its response, including emails that fail to arrive because they exceed the maximum email size of 15 MB or that are rejected or quarantined because they contain malware or other code that is screened out by SSC's security services; or
 - ii) any technical problems that prevent SSC from opening the attachments to the email(s). For example, if an attachment is corrupted or otherwise cannot be opened or cannot be read, it will be evaluated accordingly. Respondents will not be permitted to submit substitute attachments to replace any that are corrupt or empty or submitted in an unapproved format.
- j) **Hand-Delivered Responses:** All Respondents must attempt to submit their responses electronically. However, SSC will accept a hand-delivered response (as a back-up in addition to the email response), in which case the following applies:
 - i) The hand-delivered response can be:
 - (A) a soft copy (Email and attachment(s))
 - (B) a hard copy (i.e., printed on paper); or
 - (C) a combination of soft and hard copies,provided that any pricing tables that were provided by SSC to be completed by the Respondents are submitted as a soft copy.
 - ii) The hand-delivered response must be delivered by a representative of the Respondent in person or by a courier. SSC will not accept any bids delivered by regular mail.
 - iii) The hand-delivered response must be received by an SSC representative before the closing date and time at the address shown on the cover page of this document (or an alternate location arranged with the Contracting Authority in writing).
 - iv) SSC will only accept a hand-delivered copy of the response if the Respondent has coordinated delivery of that response with the Contracting Authority. As indicated above, an SSC representative will be available at the Contracting Authority's telephone number during the two hours before the closing date and time, including for the purpose of coordinating the receipt of hand-delivered responses (the Contracting Authority may also agree, at SSC's discretion, to be available at another time before the closing date and time to receive the response).
 - v) The only circumstances in which SSC will accept a hand-delivered response after the closing date and time is if the Respondent can show that the SSC representative was unavailable to receive the hand-delivered response at the coordinated time, or that no SSC representative was available at the Contracting Authority's telephone number (and no SSC representative responded to voicemail messages left at that telephone number) during the two hours leading up to the closing date and time.
 - vi) SSC will consult the hand-delivered response only if there are problems with all or a portion of the response submitted by email by the closing date and time or if no email response is received by the closing date and time. If SSC consults the hand-delivered response, it will prevail over the electronically submitted response.

4. Process for Evaluating Responses

4.1 Evaluation of Respondent Qualifications

- 1.1.1** Responses will be assessed in accordance with the entire requirement of the ITQ including the evaluation criteria.
- 1.1.2** An evaluation team composed of representatives of Canada will evaluate the responses. Canada may hire any independent consultant, or use any Government resources, to evaluate any response. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- 1.1.3** In addition to any other time periods established in the ITQ:
- a) **Requests for Clarifications:** If Canada seeks clarification or verification from the Respondent about its response, including certifications, the Respondent will have 2 working days (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the response being declared non-responsive.
 - b) **Extension of Time:** If additional time is required by the Respondent, the Contracting Authority may grant an extension in his or her sole discretion.

4.2 Technical Evaluation

a) **Mandatory Technical Criteria**

Each response will be reviewed to determine whether it meets the mandatory requirements of the ITQ. Any element of the ITQ identified with the words “must” or “mandatory” is a mandatory requirement. Responses that do not comply with each and every mandatory requirement will be declared non-responsive and be disqualified.

The mandatory requirements are described in Annex A – Qualification Requirements and will be evaluated individually on a simple pass/fail basis.

4.3 Qualified Respondent:

To be declared a Qualified Respondent, a Respondent must:

- a) comply with all the requirements of the ITQ; and
- b) meet all mandatory evaluation criteria at any time during the solicitation process

4.4 Basis of Qualification

- a) Each Respondent whose response meets all the requirements of this ITQ will become a Qualified Respondent for the next stage of the procurement process.
- b) Canada reserves the right to re-evaluate the qualification of any Qualified Respondent at any time during the procurement process. For example, if a particular security clearance is a requirement of this ITQ and the Respondent’s security clearance changes or lapses, so that the Respondent no longer meets the requirements of this ITQ, Canada may disqualify that Qualified Respondent. Similarly, if new information comes to the attention of Canada that calls into question any of the Qualified Respondent’s qualifications under this ITQ, Canada may re-evaluate that Qualified Respondent. If Canada re-evaluates the qualification of any Qualified Respondent, Canada may request further information and, if the Qualified Respondent fails to provide it within 5 working days (or a longer period provided by the Contracting Authority), Canada may disqualify the Qualified Respondent.

- c) Unsuccessful Respondents will not be given another opportunity to participate or be re-evaluated for the subsequent phases of the procurement process, unless Canada determines in its sole discretion to conduct a second qualification round.
- d) All Respondents will be notified in writing regarding whether or not they have qualified.

4.5 ITQ Phase Second Qualification Round

- a) Canada reserves the right, in its sole discretion, to conduct a second qualification round among the unsuccessful Respondents if, in Canada's opinion, the first qualification round results in an insufficient number of Qualified Respondents.
- b) If Canada determines that unsuccessful Respondents will be given a second opportunity to qualify, Canada will provide written information to all unsuccessful Respondents on the same day regarding the reasons they were unsuccessful during the first qualification round.
- c) Any Respondent who does not qualify as a result of any second qualification round conducted by Canada will not be given another opportunity to participate or be re-evaluated **for any subsequent phases of this procurement process.**

5. Agreements

5.1 Former Public Servant

- a) For services requirements, Respondents in receipt of a pension or a lump sum payment are requested to provide within the Submission Form the requested information as detailed below.
- b) 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 with FPS, respondents 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 is completed, Canada will inform the Respondent 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 response non-compliant.
- c) Definitions: For the purposes of this clause,
 - (i) "former public servant" is any former member of a department as defined in the *Financial Administration Act*, R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:
 - 1. an individual;
 - 2. an individual who has incorporated;
 - 3. a partnership made of former public servants; or
 - 4. a sole proprietorship or entity where the affected individual has a controlling major interest in the entity.
 - (ii) "lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.
 - (iii) "pension" means a pension or annual allowance paid under the *Public Service Superannuation Act* (PSSA), R.S., 1985, c.P-36, and any increases paid pursuant to the *Supplementary Retirement Benefits Act*, R.S., 1985, c.S-24 as it affects the PSSA.

It does not include pensions payable pursuant to the *Canadian Forces Superannuation Act*, R.S., 1985, c.C-17, the *Defence Services Pension Continuation Act*, 1970, c.D-3, the *Royal Canadian Mounted Police Pension Continuation Act*, 1970, c.R-10, and the *Royal Canadian Mounted Police Superannuation Act*, R.S., 1985, c.R-11, the *Members of Parliament Retiring Allowances Act*, R.S., 1985, c.M-5, and that portion of pension payable to the *Canada Pension Plan Act*, R.S., 1985, c.C-8.

d) **Former Public Servant in Receipt of a Pension:** As per the above definitions, if the Respondent is a FPS in receipt of a pension, then the Respondent must provide the following information, for all FPS in receipt of a pension, as applicable:

- (i) name of former public servant;
- (ii) date of termination of employment or retirement from the Public Service.

By providing this information, Respondents agree that the successful Respondent's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2012-2](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

e) **Work Force Adjustment Directive:** If the Respondent is a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive, then the Respondent must provide the following information:

- (i) name of former public servant;
- (ii) conditions of the lump sum payment incentive;
- (iii) date of termination of employment;
- (iv) amount of lump sum payment;
- (v) rate of pay on which lump sum payment is based;
- (vi) period of lump sum payment including start date, end date and number of weeks;
- (vii) number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

ANNEX A – Qualification Requirements

Response Form for Mandatory Experience Requirement	
Respondent	
Respondent's Name	
Respondent's Address	
Mandatory Experience Requirement 1	
<p>The Respondent must have manufactured and/or marketed, supplied, tested, implemented and maintained at least one of the infrastructures listed below as defined in Annex D – Definition of Terms. The Respondent must demonstrate that this experience occurred prior to the posting date of this ITQ, for 5 North American Customers, each with 10,000+ employees and two or more data centres consuming a minimum of 500 KVA to operate the following specified infrastructure :</p> <p>(a) Servers – x86, UNIX and non-x86 Servers (b) Storage & Back Up (c) Converged Infrastructure (d) Appliances</p> <p>Respondents must demonstrate experience in at least one of (a) or (b) or (c) or (d). Of these 5 Customers, at least 2 must be located in Canada, and 2 must be from the public sector.</p>	
Response to Mandatory Experience Requirement 1	
<div style="border: 1px solid black; height: 200px; width: 100%;"></div>	

Mandatory Experience Requirement 2

The respondent must demonstrate experience in supplying, implementing and deploying in a **secret** environment for one of the referenced customers in M01.

Response to Mandatory Experience Requirement 2



Mandatory Requirement 3

The Respondent must provide bilingual (French and English) Service Desk with toll-free support that must be 24 hours per day, 7 days per week and 365 days per year with a Service Level Agreement of 30 minutes or better response time to a live agent.

The Respondent must also provide continuous onsite support on a 24 hours per day, 7 days per week and 365 days per year basis with a 4 hour or better response time in at least 4 of the 6 Main Geographical Regions across Canada as defined in Annex C – Definition of Terms for server and/or storage infrastructure.

Additional consideration: The respondent must provide a Web Portal with a five-minute acknowledgment on tickets.

Response to Mandatory Requirement 3



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ITQ MANDATORY REQUIREMENT RESPONSE FORM

Attachment 1.2: PISA 2.0 Mandatory Evaluation Criteria Checklist	
Customer # ____	
Respondent name	
Client Industry/Business Sector or Customer name	
Type of commodity Infrastructure	<input type="checkbox"/>
Timeframe (within the past 5 years)	
Public sector customer	<input type="checkbox"/> Yes <input type="checkbox"/> No
One Customer reference in Canada	<input type="checkbox"/> Yes <input type="checkbox"/> No
Previous experience as primary Contractor with public sector Customer	<input type="checkbox"/> Yes <input type="checkbox"/> No
Language of support	<input type="checkbox"/> French <input type="checkbox"/> English <input type="checkbox"/> Other: _____
Bilingual toll free number	<input type="checkbox"/> Yes <input type="checkbox"/> No
Nationwide presence	<input type="checkbox"/> Yes <input type="checkbox"/> No
International Support	<input type="checkbox"/> Yes <input type="checkbox"/> No
Type of support	<input type="checkbox"/> Onsite <input type="checkbox"/> Other: _____
Hours of support	<input type="checkbox"/> 24/7 <input type="checkbox"/> Other: _____
Response time	
E-mail Support	<input type="checkbox"/> Yes <input type="checkbox"/> No
Electronic Ticketing System Support	<input type="checkbox"/> Yes <input type="checkbox"/> No
Local 3rd Party Vendor Partnership	<input type="checkbox"/> Yes <input type="checkbox"/> No
Comments, additional substantiation or details	

ANNEX B
Security Requirements Check List (SRCL)
Please see attachment titled “Annex B Security Requirement Checklist”

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ANNEX C

PROCUREMENT PROCESS

Overview

The multi-phase Collaborative Procurement Approach (CPA) process is shown below in Figure 1 and summarized below in Table 4. This process will be used until the final RFSA(s) are issued to the Qualified Respondents (QR) in the Solicitation Phase. This approach will allow Canada to conduct due diligence with respect to the requirements with Qualified Respondents before issuing solicitation(s).

Figure 1: Procurement Approach

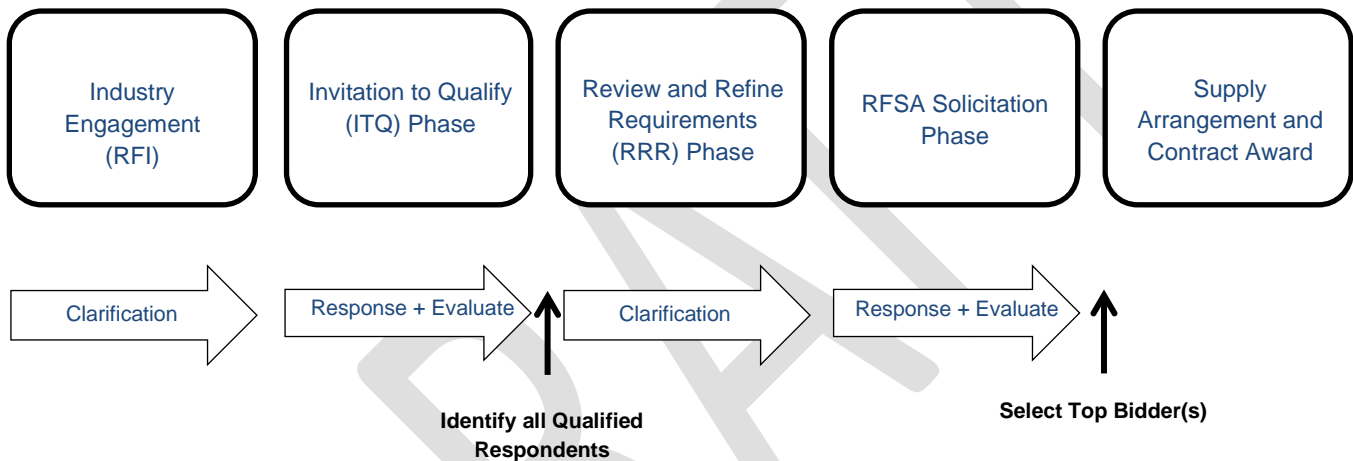


Table 4: Summary of Procurement Phases

Procurement Phase	Objectives
Industry Engagement (RFI)	<ul style="list-style-type: none"> Solicit feedback from Industry on Canada’s proposed strategy, through a Request for Information (RFI) This phase has been completed
Invitation to Qualify	<ul style="list-style-type: none"> Issue ITQ on Canada Buy Obtain ITQ responses from Respondents Evaluate ITQ responses Select the Qualified Respondents to continue to the Review and Refine Requirements Phase
Review and Refine Requirements	<ul style="list-style-type: none"> Qualified Respondents have an opportunity to enhance their understanding of the requirements Qualified Respondents may be required to provide their Supply Chain Security information (SCSI), which may include IT products (equipment, firmware, software, services), subcontractors list, and network diagrams SSC may conduct the Supply Chain Integrity (SCI) verification of the Respondents’ SCSI to ensure that all IT products meet certain security and supply chain standards

Procurement Phase	Objectives
	<ul style="list-style-type: none"> If the SCI verification is completed at the RRR phase, only vendors with qualified product lists will continue to the Bid Solicitation Phase
Solicitation	<ul style="list-style-type: none"> Issue one or more solicitations to all Qualified Respondents Supply Chain Integrity verification if it was not completed at the RRR phase Obtain proposals from the Bidders Evaluate the proposals Select the successful proposals
Supply Arrangement and Contract Award	<ul style="list-style-type: none"> Award the SA agreements to the compliant respondent(s)

Invitation to Qualify Phase

The objective of the ITQ is to qualify Respondents who have experience in the provisioning and implementation of IT infrastructure services.

The Mandatory Evaluation Criteria will be evaluated individually by Category. The Mandatory Evaluation Criteria focus on the Respondent's ability to deliver the IT infrastructure, taking into consideration capacity and capability based on previous and current project experience.

Respondents who meet all the mandatory experience requirements for a given Category will become Qualified Respondents and will proceed to the Review and Refine Requirements Phase for that Category as described below.

Once the Qualified Respondents have been selected and have been notified that they have qualified for the next phase of the procurement process, Canada intends to proceed with the Review and Refine Requirements Phase. Qualified Respondents may withdraw from the process at any time by providing written notification to the Contracting Authority.

Review and Refine Requirements Phase

Canada intends to start the Review and Refine Requirements (RRR) Phase by providing Qualified Respondents the detailed process that will be followed for this Phase to the Qualified Respondents.

During the RRR Phase, Canada may provide Qualified Respondents with information which may include, but not necessarily be limited to: Canada's outline of the anticipated requirement, portions of a draft Statement of Work (SOW), draft contractual terms and conditions. This information is intended to stimulate feedback from the Qualified Respondents in order to assist Canada in clarifying its direction and further refining the requirements of the solicitation. These interactions could include:

- a) one-on-one sessions;
- b) presentation sessions;
- c) interactive collaborative tools; and/or
- d) written questions and answers.

Canada will consider the feedback provided by Respondents when finalizing the SOW and its solicitation requirements for use in the Bid Solicitation Phase.

Once the technical requirements are finalized, Canada may request that Respondents provide the Supply Chain Security Information.

Canada may conduct a Supply Chain Integrity verification of the Respondents' IT products to ensure that all IT products meet certain security and supply chain standards. More information about this process will be provided to the Qualified Respondents during the RRR Phase.

If the Supply Chain Integrity process is completed at the RRR phase, only the Respondents who pass the Supply Chain Integrity verification will continue to be Qualified Respondents and will proceed to the Bid Solicitation Phase described below.

RFSA Solicitation Phase

During the Solicitation Phase, Canada may issue one or more formal solicitations to the Qualified Respondents. The Supply Chain Integrity verification process may take place at this phase.

Supply Arrangement and Contract Award Phase

Any supply arrangement(s) and/or contract(s) will be awarded after completion of the RFSA Solicitation Phase and any necessary internal approvals have been received.

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**ANNEX D
DEFINITION OF TERMS**

Term	Definition
6 Main Geographical Regions	<p>The six geographical regions of Canada are:</p> <ul style="list-style-type: none"> • Atlantic • Quebec • Ontario • Prairies • British Columbia • Territories
Affiliate	For the purposes of this solicitation, Affiliate has the same meaning as “affiliated persons” under the <i>Canada Income Tax Act</i> .
Bid	An offer to provide services or supply goods as a result of a solicitation.
Bidder	A person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a contract for goods, services or both. It includes the parent, subsidiaries and other affiliates of the bidder.
Classified information	<p>This relates to the National Interest. It concerns the defence and maintenance of the social, political, and economic stability of Canada. There are three levels of Classified information:</p> <p>Top Secret: A very limited amount of compromised information could cause exceptionally grave injury to the National Interest.</p> <p>Secret: Compromise could cause serious injury to the National Interest.</p> <p>Confidential: Compromise could cause limited injury to the National Interest.</p>
Client Organization	An entity of users, from either a public or private sector organization, receiving services from SSC operated by the ITQ Response Lead or Core Team Members 2 and/or 3.
Collaborative Procurement Approach (CPA)	<p>A procurement methodology consisting of the following phases:</p> <ul style="list-style-type: none"> (i) Industry Engagement Phase – to seek industry feedback on the project and procurement approach; (ii) ITQ Phase – to identify Qualified Respondents; (iii) Review and Refine Requirements Phase – Qualified Respondents collaborate with SSC to review and refine the business and technical requirements; (iv) Bid Solicitation Phase – Qualified Respondents are invited to submit technical and price proposals; (v) Contract Award Phase – issue contract(s) to winning Bidder(s); and (vi) Implementation Phase – design architecture, build and implementation of PISA 2.0 - EITP and service delivery.

Term	Definition
Cloud Management Platform	
Converged Infrastructure	<p>Converged Infrastructure is the name generally used to describe a pre-engineered set of servers, storage, networking and security systems that are integrated into shared pools of interoperable resources and managed through a common management and orchestration platform.</p> <p>For the purposes of this ITQ, SSC is specifically looking for the following:</p> <ul style="list-style-type: none"> • The Converged Infrastructure must be marketed as a single product by an Original Equipment Manufacturers (OEM) or consortium, including documentation and support. Although the system can be sold as a single or multiple SKU solution, any system designed for another purpose, or consisting of a number of disparate components assembled together without providing a single point of management, and a single point of support for customers (e.g. single 1-800 number to place a service call) will not be considered; • The Converged Infrastructure must be fully operational and fully integrated, containing all major components, management software, and optional accessories when shipped. These include but are not limited to: <ul style="list-style-type: none"> ○ system enclosure and/or rack cabinet (where appropriate); ○ computing systems; ○ network/storage fabric switches; ○ disk array controllers; ○ disk drives; ○ shelving units, power supplies and cooling systems necessary for the system; and ○ any required service / systems management software or function required to integrate with an overall Enterprise service / systems management system. • The Converged Infrastructure must be sized and deployed based on templates that allow for implementation and growth with a predefined approach; and • The Converged Infrastructure must include all vendor management and proprietary software and software or port licenses (for any of the included components), device drivers, and cabling required for the system.
Contractor	Contractor means any individual who or organization which enters into a Procurement contract with SSC
GC	Government of Canada
Government Furnished Equipment (GFE)	Government Furnished Equipment (GFE) is equipment that is owned by the government and delivered to, or made available to the suppliers.

Term	Definition
Invitation to Qualify (ITQ)	Procurement instrument used to identify Qualified Respondents for subsequent phases of the CPA.
ITQ Response Lead	The Respondent of a Core Team.
Joint Venture	Association of two or more parties who combine their money, property, knowledge, expertise or other resources in a single joint business enterprise, sometimes referred as a consortium, to bid together on a requirement.
Original Equipment Manufacturer (OEM)	The manufacturer of the hardware, as evidenced by the name appearing on the hardware and on accompanying documentation.
Partners	Departments and agencies for which SSC provides information technology (IT) services.
Platform	General purpose information systems components used to process and store electronic data, such as desktop computers, servers, network devices, and mobile devices. Platforms usually contain server hardware, storage hardware, utility hardware, software and operating systems.
Project Reference	A reference from a client of the Respondent regarding a project that was performed by the respondent for that client. Project References are used to address the mandatory requirements in Attachment 4.1: Mandatory Evaluation Criteria.
Protected Information	<p>Protected information refers to specific provisions of the <i>Access to Information Act</i> and the <i>Privacy Act</i> and applies to sensitive personal, private, and business information.</p> <p>Protected C: Compromise of a very limited amount of information could result in exceptionally grave injury, such as loss of life.</p> <p>Protected B: Compromise could result in grave injury, such as loss of reputation or competitive advantage.</p> <p>Protected A: Compromise could result in limited injury.</p>
Qualified Respondent	A Respondent who has been evaluated as compliant with the requirement of the ITQ phase of the procurement.

Term	Definition
Reference Architecture	<p>A Reference Architecture provides the template solution for an architecture for a particular domain. In the context of this ITQ, a Reference Architecture provides</p> <ul style="list-style-type: none"> - the list of features and functions of the server and/or storage platforms; - the structures elements and relationship of the server and/or storage platforms; - the list of physical and digital interfaces, including their relationship with each other and with functions located outside of the scope of the server and/or storage platforms; - the high-level specifications of the server and/or storage platforms; - the list of standards to which the server and/or storage platforms must adhere - a common vocabulary.
Respondent	A vendor who submits a Response to this ITQ.
Responding Group	<p>As defined in the ITQ, Section 3.1.4 b) Responding Group includes all entities (whether those entities include one or more natural persons, corporations, partnerships, limited liability partnerships, etc.) that are related to one another....</p> <p>Responding Group = Respondent = Core Team Lead</p>
Response	The Respondent's submission in response to this ITQ.
SSC	Shared Services Canada
Stand Alone Server	A stand alone server is used to operate a single instance of an operating system.
Storage	<p>For the purpose of this ITQ, Storage at minimum refers to one of the following;</p> <ul style="list-style-type: none"> • Storage Attached Networks (SAN), including the storage subsystem and network components • Network Attached Storage (NAS), including capacity and appliance to provide at minimum NFS and CIFS based services • Systems for storage subsystem virtualization • Appliances for the purpose of backup, archiving, and object storage services • Virtual Tape Libraries and tape Robotic Systems
System	A generic term used to mean network and other devices, operating systems, computing platforms, virtualization software and applications or any combination thereof. Its use is context specific.

Term	Definition
Unix Servers	A UNIX server is a server that conforms to the latest IEEE/Open group POSIX.1 standard (IEEE Std 1003.1, 2013 Edition). The chipset architecture can include SPARC/Itanium/Power.
Virtual Servers	An individual instance of an operating system, where the underlying compute, storage, and network infrastructure is owned and managed by the supplier.
x86 Servers	A X86 server that runs applications and instructions set that is compatible with the 8086 CPU. The chipset architecture includes 16 Bit, 32 Bit and 64 Bit.

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FORM 1

ITQ SUBMISSION FORM

ITQ SUBMISSION FORM	
Respondent full legal name <i>[Note to Suppliers: Suppliers who are part of a responding group should take care to identify the correct corporation as the Respondent.]</i>	
Authorized Representative of Respondent for evaluation purposes (e.g. clarifications)	Name:
	Title:
	Address:
	Telephone #:
	Email:
Respondent's Procurement Business Number (PBN) <i>[see the Standard Instructions 2003]</i> <i>[Note to Respondents: Please ensure that the PBN you provide matches the legal name under which you have submitted your response. If it does not, the Respondent will be determined based on the legal name provided, not based on the PBN, and the Respondent will be required to submit the PBN that matches the legal name of the Respondent.]</i>	Procurement Business Number:
Canada's Official Language in which the Respondent will communicate with Canada during any subsequent process - indicate either English or French	English _____ French _____
Former Public Servants See Part 5 of the ITQ entitled Former Public Servant Certification for a definition of "Former Public Servant". This requirement applies to the Respondent. In the case of a joint venture Respondent, the requirement applies to each member of the joint venture.	Is the Respondent in receipt of a pension as defined in this solicitation? Yes ____ No ____ If yes, please provide the information required by the Article in section 5.1 entitled "Former Public Servant", and complete form 2. Is the Respondent a FPS who received a lump sum payment under the terms of a work force reduction program? Yes ____ No ____ If yes, please provide the information required by the Article in section 5.1 entitled "Former Public Servant", and complete form 2.
Applicable Laws: Respondent are requested to indicate the Canadian province or territory they wish to apply for applicable laws, as indicated in Part 3	

ITQ SUBMISSION FORM

Respondent's Proposed Site or Premises Requiring Safeguard Measures <i>[Delete if not applicable]</i>	Address: Street Number / Street Name /, Unit / Suite / Apartment number City, Province, Territory / State Postal Code / Zip Code Country
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Security Clearance Level of Respondent <i>[include both the level and the date it was granted]</i> <i>[Note to suppliers: Please ensure that the security clearance matches the legal name of the Respondent. If it does not, the security clearance is not valid for the Respondent.]</i>	
--	--

CORE TEAM MEMBERS (IF APPLICABLE) (REPEAT AS REQUIRED)

Core Team Member's full legal name	
Relationship to Respondent for the purpose of ITQ	
Original Equipment Manufacturer (Y/N)	
Core Team Member used to meet ITQ Criteria (Y/N)	
Core Team Member's full legal name	
Relationship to Respondent for the purpose of ITQ	
Original Equipment Manufacturer (Y/N)	
Core Team Member used to meet ITQ Criteria (Y/N)	

As the authorized representative of the Respondent, by signing below, I confirm that I have read and understood the entire ITQ including the documents incorporated by reference into the ITQ and the entire Response, and I certify that:

1. The Respondent meets all the mandatory requirements described in the ITQ; and
2. All the information provided in the ITQ Response is complete, true and accurate.

Signature of the authorized representative of the Respondent	Name	
	Address	
	Email	
	Signature	
	Phone	

FORM 2

FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - CERTIFICATION

I, the Respondent, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a response or bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the response or bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Respondent's certifications. Failure to comply with such request by Canada will also render the response or bid non-responsive or will constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit [ESDC-Labour's website](#).

Date : _____ (YYYY/MM/DD) (If left blank, the date will be deemed to be the ITQ closing date.)

Complete both A and B.

A. Check only one of the following:

- A1. The Respondent certifies having no work force in Canada.
- A2. The Respondent certifies being a public sector employer.
- A3. The Respondent certifies being a [federally regulated employer](#) being subject to the [Employment Equity Act](#).
- A4. The Respondent certifies having a combined work force in Canada of less than 100 employees (combined work force includes: permanent full-time, permanent part-time and temporary employees [temporary employees only includes those who have worked 12 weeks or more during a calendar year and who are not full-time students]).

A5. The Respondent has a combined workforce in Canada of 100 or more employees; and

- A5.1. The Respondent certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

OR

- A5.2. The Respondent certifies having submitted the [Agreement to Implement Employment Equity \(LAB1168\)](#) to HRSDC-Labour. As this is a condition to the award of a contract resulting from any subsequent bid solicitation, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

- B1. The Respondent is not a Joint Venture.

OR

- B2. The Respondent is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions)