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	**November 22, 2023**
GCDocs File No.	N/A	GETS Reference No.	TBA

Issuing Office	Shared Services Canada 99 Metcalfe Street Ottawa, Ontario K0A 0C3	
Contracting Authority (The Contracting Authority is SSC's representative for all questions and comments about this document.)	Name	Aimeric Manzi Ganineza Makara Phan
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	Postal Address	
Closing Date and Time	Friday, December 22, 2023	
Time Zone	Eastern Standard Time (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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for the Procurement Process for
Physical Infrastructure Supply Arrangement (PISA 2.0)

1.   General Information

Shared Services Canada (SSC) operates and manages data centers to host government applications and data to our 45 partner departments and clients. To effectively serve Canadians and Government of Canada users, the PISA was created as a dedicated supply arrangement to meet the ever-evolving needs of our digital age.

PISA 2.0 allowed the Government of Canada to review and update their requirements and to address industry concerns. In addition, updates have been made to ensure the inclusion and promotion of socioeconomic factors to align with Government of Canada policies.

The purpose of this Invitation to Qualify (ITQ) is to pre-qualify vendors for later phases of the procurement process. SSC intends to establish solicitations for contracts, standing offers and/or supply arrangements.

In summary, the scope of the ITQ is to create a broad and inclusive supply arrangement for physical infrastructure equipment and services, accessible to vendors across Canada. This approach aims to provide Shared Services Canada with a flexible and competitive procurement mechanism to meet its evolving infrastructure needs while promoting diversity.

1.1   Introduction

a)   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.

b)   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

a)   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.

b) The requirement is summarized, with a complete description of the individual categories and a responsibility matrix available in Section 1.4 (Procurement Strategy) and Section 1.5 (Responsibility matrix). SSC will finalize the structure of the Categories, and possible sub-categories within each Category, during the Review and Refine Requirements (RRR) Phase.

c) Additional Categories may follow, the criteria defined in this ITQ are strictly for qualification purposes and the criteria and categories for future solicitations will be further defined during the RRR Phase.

d) 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.

e) 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.

1.3   Scope of Anticipated Procurement:

a) 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.

b) Number of Supply Arrangement: SSC is currently contemplating the award of multiple Supply Arrangements.

c) 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.

1.4   Procurement Strategy

SSC's procurement strategy for the Supply Arrangement is currently based on vendors being qualified on the following categories. SSC will finalize the structure of the categories, and sub-categories during the Review and Refine Requirements Phase.

ITEM	Categories	Subcategories

1.0	Servers	a) X86 Server
		
		    i) Multiple classes of standalone servers
		    ii) Additional hardware components
		    iii) Maintenance, support, break/fix, firmware update, patch management, etc.
		
		b) UNIX or non-X86 Servers
		    i) Multiple classes of standalone servers
		    ii) Additional hardware components
		    iii) Maintenance, support, break/fix, firmware update, patch management, etc.
		
		c) Decommissioning
		
		d) Post-warranty support

2.0	Storage and Back-up	a) Storage Hardware
		
		    i. Block based system,
		    ii. Network Attached Storage,
		    iii. Tape Library, Storage appliances such as Data Domains and virtual tape libraries (i.e. smart backup appliances),
		    iv. Additional hardware components
		
		b) Solutions such as hyperconverged storage and Object storage.
		
		c) Storage fabric
		
		d) Maintenance, support, break/fix, firmware update, patch management, etc.
		
		e) Decommissioning
		
		f) Post warranty support

3.0	Converged Infrastructure	Combination of computing, storage, networking, and virtualization resources into a pre-integrated, vendor-validated system
		
		 a) x86 Converged System
		    i) Infrastructure built using x86-based hardware
		
		 b) Hyper Converged System
		    i) Single, tightly integrated platform
		
		 c) Additional hardware components
		
		 d) Post warranty support

4.0	Appliances	a) Purpose-built devices/server b) Physical or virtual c) Additional hardware components d) Post warranty support

1.5 Responsibility Matrix

This Responsibility Matrix identifies the responsible party (SSC or supplier) for the ownership, installation and life cycle functions.

Mandatory (M): Service must be performed by selected owner.

Optional (O): Services can be performed by SSC, and the supplier must be capable of providing the service at the request of SSC.

Responsibility	SSC	Supplier
Ownership - Hardware	M	
Ownership - Licensing	M	
Ownership - Data Assets	M	
Ownership - Product Requirements	M	
Ownership - Product Specifications.		M
Installation - Planning and Design	M	O
Installation - Hardware	M	O
Installation - Hardware Licensing	O	M
Life Cycle - Provisioning	M	

Life Cycle - Capacity Planning	M	O
Life Cycle - Break/Fix	O	M
Life Cycle - Patch and Microcode creation	O	M
Life Cycle - Maintenance implementation	M	O
Life Cycle - Decommissioning	M	O
Life Cycle - Sanitization & Destruction of Electronic Media	M	
Life Cycle - Post warranty support	O	M

1.6   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 is open to the Qualified Respondents of the ITQ phase. The objective of the RRR phase is to obtain feedback from Qualified Respondents on Canada's preliminary requirements. 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. 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.

d)   **SCSI Assessment**: Qualified respondents will be required to submit "Supply Chain Security Information" (SCSI) for assessment by government of Canada. 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.

1.7 Accessibility

a) SSC's role in promoting accessibility

The *Accessible Canada Act* is intended to enhance the full and equal participation of all persons, especially persons with disabilities, in society. This is to be achieved through the progressive realization, under federal jurisdiction, of a Canada without barriers, particularly by the identification, removal and prevention of barriers.

SSC's goal is to ensure that the goods and services the SSC buys are inclusive by design and accessible by default. Considering accessibility in public procurements is now an obligation in the Treasury Board Directive on the Management of Procurement. Accessibility criteria must be included in the requirements for goods and services, where appropriate.

SSC has a role in implementing the Government of Canada's (GC) vision for a more accessible Canada because SSC provides the information technology infrastructure that supports the delivery of digital services to Canadians and GC employees. This means that SSC is engaged in the procurement of goods and services and in supporting the delivery of programs and services by other government departments, both of which are areas covered by the *Accessible Canada Act*. SSC's goal is for its information technology infrastructure to be more accessible and usable by the broadest range of government officials and Canadians who use it, including those with disabilities.

SSC is committed to providing leadership to procure accessible ICT goods and services and supporting the goal of inclusive by design, accessible by default. This procurement includes accessibility requirements which are adopted from the EN 301 549 (2021) Harmonized European Standard – Accessibility requirements for ICT products and services.

As the intention is for this initiative to take place progressively, suppliers should anticipate that, where a procurement vehicle (e.g. Supply Arrangement) is set up and includes high level ICT accessibility requirements based on the EN 301 549 (2021), that individual drawdowns / procurements / contracts may specify specific accessibility requirements from the EN 301 549 (2021).

b) Objective: to remove barriers

In support of the *Accessible Canada Act*, Nothing without us: An accessibility Strategy for the Public Service of Canada and the Guideline on Making Information Technology Usable by All to remove and not create new technological barriers to Information and Communications Technology (ICT) accessibility.

All Information and Communication Technology (ICT) components of the proposed solution should conform with relevant accessibility requirements of the EN 301 549 (2021) as detailed in Annex E – ICT Accessibility Requirements**.**

These components include but are not limited to: product documentation and support services, any provided non-web documents, and installed software which has a graphical user interface in the form of the operating system, or preinstalled software**.**

Where the procurement includes an Annex with a limited set of accessibility requirements, and the supplier's proposed solution includes other ICT elements that are not included in the listed clauses, the supplier will be held to all relevant accessibility requirements of the EN 301 549 (2021) which includes clauses 5 through 13.

c) Supply arrangements: Future task requirements

Contracts drawn from this Agreement may include accessibility requirements as part of the deliverables. Specific ICT accessibility requirements will be specified where appropriate.

d) Handling user ICT accessibility complaints

In the event the proposed solution does not presently conform with ICT accessibility requirements, an end user may put forward an issue, complaint, or request for accommodation to the supplier. If an issue, complaint or request is received, the supplier will contact the Contracting Authority immediately to discuss options to meet the immediate needs as part of Duty to Accommodate.

While permanent solutions may already be part of an ICT accessibility roadmap, immediate accommodations are required to ensure equal access to all participants. The user must receive ICT accessibility accommodations within fifteen (15) business days of the issue, complaint or request being received and the Contracting Authority must be advised of both the request and the accommodation provided.

e) Guidance for creating accessible documents

For practical guidance on creating accessible documents, refer to the [Accessible Document Guides found on the Digital Accessibility Toolkit](#).

f) Multiple formats

Where documents are provided in more than one format (for example a report provided in both PDF and Excel format), at least one of these must meet the criteria of Chapter 10 "Non-web documents" as detailed in Annex E – ICT Accessibility Requirements. The accessible version must provide equivalent information to the inaccessible version. A notice must be posted indicating which format is accessible.

g) Printed documents

Printed documents provided to SSC employees must adhere to the relevant requirements of the electronic documents, including but not limited to text contrast and use of colour. For practical guidance, refer to Appendix 2 to Annex E -Accessibility guidance for printed documents.

To ensure equal access for persons with print disabilities, accessible electronic versions must be available which provide equivalent content to the printed documents.

1.7.2 Green Procurement Initiatives

Shared Services Canada (SSC) supports the Greening Government Strategy in a variety of ways – including changing the way we buy goods and services. SSC awards thousands of contracts for IT goods and services each year with a combined value of roughly $4 billion, giving the department a tremendous opportunity to champion more sustainable manufacturing practices by requiring vendors meet environmental standards.

This is just one of the ways the Government is working to meet its goals to reduce greenhouse gas emissions, support the growth of Canadian clean technology producers and increase the resiliency of assets, services, and operations in the face of a changing climate.

These activities align with the GC's Policy on Green Procurement, which requires that the procurement of goods and services actively promote environmental stewardship by;

- Using the government's buying power to aid the transition to a low carbon economy
- Working on implementing the Standard on the Disclosure of Greenhouse Gas Emissions and the Setting of Reduction Targets for procurements valued above $25M
    - with efforts made to also implement the requirement in procurements over $1M.

- Incorporating environmental criteria into SSC's processes and procurement methods, aiming to incorporate green standards, such as carbon reduction, sustainable plastics, and broader environmental benefits, in at least 40% of SSC's procurement vehicles for goods and services with significant environmental implications.

Through the various stages of the solicitation and subsequent supply arrangement SSC intends to apply/implement Green procurements initiatives such as but not limited to:

- Registration and participation to Canada's Net Zero program or equivalent initiative,

- Reduction plans in greenhouse gas emissions targets,

- The application of EPEAT certifications for relevant commodities

1.7.3 Indigenous and Socio-Economic Initiatives

SSC aims to do everything possible to unlock further value from federal procurement to drive innovation and economic growth, while reducing the barriers to entry for diverse suppliers, such as small and medium-sized enterprises (SME) and companies owned and operated by under-represented groups.

SSC is working to further increase supplier diversity and enhance economic and social opportunities for under-represented groups. As government Information Technology (IT) service delivery is modernized, the Government of Canada (GC) is making procurement more agile, collaborative and inclusive to promote social values, as well as environmental sustainability.

SSC is striving to establish an exemplary model for IT procurements and service delivery to drive fair and inclusive business practices in Canada. SSC seeks to level the playing field for small and medium enterprises and vendors operating across Canada, including in rural and remote communities. SSC's practices broaden participation in IT service design and delivery. SSC is actively working on initiatives to increase the diversity of bidders, in particular businesses owned or led by Canadians from under-represented groups, such as Indigenous Peoples and persons with disabilities. SCC is taking measures to increase the accessibility of the procurements to such groups, by considering, for example, the possibility of voluntary self-identification.

Through the various stages of the solicitation and subsequent supply arrangement SSC intends to apply/implement various initiatives in its procurements to support socio economic initiatives such as but not limited to:

- Procurement Strategy for Indigenous Business (PSIB):

Under the PSIB, contracts that serve a primarily Indigenous population are set aside for competition among qualified Indigenous businesses. Federal employees are also encouraged to voluntarily set aside opportunities for competition among Indigenous businesses whenever practical. Indigenous businesses can also compete for federal contracts which are open to all qualified suppliers, as well as those which are set aside for competition among qualified Indigenous suppliers.

- SSC intends to support the underrepresented business through PISA 2.0

SSC procurement has an impact on Canadian registered underrepresented socio-economic groups that include but are not limited to: Small and Medium-size Enterprises (SMEs); Women-owned Businesses; Women-led Businesses; Visible Minorities Businesses; Indigenous Businesses; People with Disabilities Businesses; and others.

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 Services and Procurement 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:

a. Further communications for interested suppliers will be provided.

b. A site visit is not required.

c. 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

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 one (1) question period, as follows:

Question Period: Questions and enquires must be submitted in writing electronically to dcspi-cdips@ssc-spc.gc.ca, no later than *Friday, December 8th, 2023 at 2:00 PM Eastern Standard Time*. Enquiries received after that time may not be answered. Answers will be released by SSC no later than *Friday, December 15th, 2023*. Enquiries received after that time may not be answered.

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) A preliminary version of the Security Classification Guide and 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.

b) Should a respondent qualify through the ITQ phase and subsequent Request for Supply Arrangement (RFSA) phase, before they are awarded a Supply Arrangement agreement, Canada will assess whether the Supplier meets all eligibility requirements described in future phases of the Solicitation, including but not limited to:

        i)   Confirming the Supplier holds a valid organizational security clearance as indicated in Annex B – Security Requirements Check List;

        ii)   Conducting the Integrity Check described in Section 01 of Public Services and Procurement Canada's 2008 Standard Instructions – Goods or Services – Competitive Requirements;

        iii)   Conducting the Supply Chain Integrity check, to validate the Supplier's tools and subcontractors.

    c)   Information for Respondents that require new or additional security clearances.

        i)   About organization security screening – Organization security screening – Security requirements for contracting with the Government of Canada – Canada.ca (tpsgc-pwgsc.gc.ca) https://www.tpsgc-pwgsc.gc.ca/esc-src/organisation-organization/apropos-about-eng.html

        ii)   Contact the Contract Security Program - Security requirements for contracting with the Government of Canada - Canada.ca (tpsgc-pwgsc.gc.ca) https://www.tpsgc-pwgsc.gc.ca/esc-src/communiquer-contact-eng.html

        iii)   Contact Information
Effective April 8, 2022 we provide service in French and English, Monday to Friday, 9 am to 12 pm and 1 pm to 5 pm (Eastern time).
- Toll-free: 1-866-368-4646
- National Capital Region: 613-948-4176
- Email: ssi-iss@tpsgc-pwgsc.gc.ca

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

a)   Responses will be assessed in accordance with the entire requirement of the ITQ including the evaluation criteria.

b)   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.

c)   In addition to any other time periods established in the ITQ:

i)   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.

ii)   Extension of Time: If additional time is required by the Respondent, the Contracting Authority may grant an extension at the GC's 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.

ANNEX A
QUALIFICATION REQUIREMENTS

Please respond in the attached document titled: "Annex A - Qualification Requirements Response".

APPENDIX 1 to ANNEX A
ITQ MANDATORY REQUIREMENT RESPONSE

Please respond in the attached document titled: "**ITQ Mandatory Requirement Response**" **form.**

ANNEX B
SECURITY REQUIREMENTS CHECK LIST (SRCL)
Please see the attached document titled: "Annex B - Security Requirement Checklist".

ANNEX C
Security Classification Guide

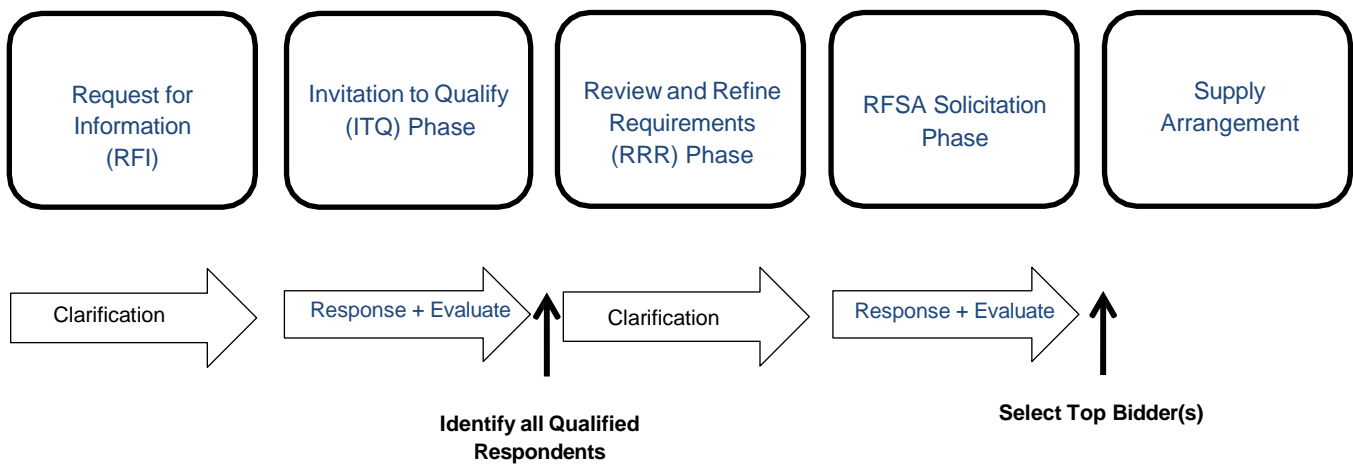| This guide is to be completed in addition to question 10.a) of the SRCL when multiple levels of personnel screening are therein identified. Indicate which personnel screening levels are required for which portions of the work/access involved in the contract.		
level of personnel clearance (e.g. reliability, secret)	position / description/task	access to sites and/or information levels of Information to be accessed
Reliability	Support Analysts	Required for access to telecom rooms and operational zones. No infrastructure access permitted.
Secret	On site Technicians	Required for access to Security zones. Required for access to Infrastructure up to Protected B. May be escorted while on site.
Unscreened Personnel	Support Analysts, Client Support, Sales support / fulfilment	No access to protected and or classified information or assets. May be provided with scrubbed logs if required.
Additional clearances may be required		

ANNEX D
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 and/or Requesting for Information	• Solicit feedback from Industry on Canada's proposed strategy, through a Request for Information (RFI) • **This phase has been completed**
Invitation to Qualify	• 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	• 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
	• If the SCI verification is completed at the RRR phase, only vendors with qualified product lists will continue to the Bid Solicitation Phase
RFSA Solicitation	• 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	• 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 requirements, draft contractual terms and conditions. This information is intended to solicit 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 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

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.

ANNEX E
DEFINITION OF TERMS

Term	Definition
6 Main Geographical Regions	The six geographical regions of Canada are: • Atlantic • Quebec • Ontario • Prairies • British Columbia • Territories
Affiliate	For the purposes of this solicitation, Affiliate has the same meaning as "affiliated persons" under the *Canada Income Tax Act.*
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	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: Top Secret: A very limited amount of compromised information could cause exceptionally grave injury to the National Interest. Secret: Compromise could cause serious injury to the National Interest. Confidential: Compromise could cause limited injury to the National Interest.
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)	A procurement methodology consisting of the following phases: (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	Cloud management platforms are integrated products that provide for the management of public, private and hybrid cloud environments

Converged Infrastructure	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.
	
	For the purposes of this ITQ, SSC is specifically looking for the following:
	
	• 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:
	    o system enclosure and/or rack cabinet (where appropriate);
	    o computing systems;
	    o network/storage fabric switches;
	    o disk array controllers;
	    o disk drives;
	    o shelving units, power supplies and cooling systems necessary for the system; and
	    o 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
DC	Data Center
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	Protected information refers to specific provisions of the *Access to Information Act* and the *Privacy Act* and applies to sensitive personal, private, and business information. **Protected C:** Compromise of a very limited amount of information could result in *exceptionally grave injury*, such as loss of life. **Protected B:** Compromise could result in *grave* injury, such as loss of reputation or competitive advantage. **Protected A:** Compromise could result in *limited injury*.
Qualified Respondent	A Respondent who has been evaluated as compliant with the requirement of the ITQ phase of the procurement.

Term	Definition
Reference Architecture	A Reference Architecture provides the template solution for an architecture for a particular domain. In the context of this ITQ, a Reference Architecture provides - 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	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…. Responding Group = Respondent = Core Team Lead
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	For the purpose of this ITQ, Storage at minimum refers to one of the following; • 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 Shared Services Canada Service Line allocating the virtual capacity.
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.

ANNEX F
ACCESSIBILITY

Please find attached links for Accessibility references:

1. Tools and resources - Digital Accessibility Toolkit / Sharing space (canada.ca) (English and French).

2. (English only) EN 301 549 (2021) ETSI EN 301 549 - V3.2.1 - Accessibility requirements for ICT products and services.

3. Appendix 1 – ICT Accessibility requirements

4. Appendix 2 - Accessibility guidance for printed documents

FORM 1
ITQ SUBMISSION

Please respond in the attached document titled : "ITQ Submission" form.

FORM 2
FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY CERTIFICATION

Please respond in the attached document titled: "Federal Contractors Program for Employment Equity Certification". (If applicable)