

JUSTIFICATION FOR SOLE SOURCE/BRAND NAME SOLE SOURCE <\$150K

PO Number:			
The effort listed on this form is for: (please mark one):	<input checked="" type="checkbox"/>	Supply	<input type="checkbox"/> Service
The material and/or service listed on this form is (please mark one):	<input type="checkbox"/>	Sole Source	<input checked="" type="checkbox"/> Brand Name

Restricted to the following source or manufacturer:

- **Manufacturer/Source:**
Wharton Research Data Services/Trustees of the University of Pennsylvania
- **POC and Phone Number:**
Keith Zluky 1.215.573.8379 kzluky@wharton.upenn.edu
- **Address:**
3819 Chestnut Street Suite 300, Philadelphia, PA 19104 US

Description of the item(s) or service(s) required and the estimated cost(s):

Item#	MFG Name	MFG Part#	Description	Qty	U/I	Unit Price	Ext Price
1			WRDS Annual Subscription	1		[REDACTED]	[REDACTED]

1. List the Required Delivery Date (RDD) or Period of Performance (POP):

PoP Aug 1, 2016- July 31, 2017

*** If additional space is required, please attach a continuation sheet.

2. Specify characteristics of the material or service that limit the availability to a sole source/brand product (unique features, function of the item, etc.). Describe in detail why only this source/brand can furnish the requirements to the exclusion of other sources/brands.

WRDS is a proprietary, single solution platform for large-scale current and historical company financial and statistical data access and manipulation. This product is the de facto standard for business data. Access to these curated and normalized data sets is necessary for conducting high-level corporate financial analysis and quantitative data research. Researchers in the School of business and Public Policy need access to this product in order to generate top-quality academic accounting and financial research results. Using WRDS, researchers can import, export, compare and manipulate very large sets of company financial and statistical data that are not available elsewhere in this form and aggregate. WRDS is recognized by the academic and financial research community around the world as the leading business intelligence tool. No similar comparable product exists.

3. Indicate if the requested material or service represents the minimum requirements of the Government.

The requested material represents the minimum requirements of the Government.

- 4. Indicate if the material or service must be compatible in all aspects (form, fit, and function) with existing systems presently installed/performing. Describe the equipment/function you have now and how the new item/service must coordinate, connect or interface with the existing system.

The service and platform must be compatible with existing data sets desired for subscription – in particular, S&P’s Compustat and Audit Analytics. Data access needs to be available via Matlab, R and Python.

- 5. Does a patent, copyright or proprietary data limit competition?

Yes. The platform and its features, as well as the data sets in their normalized state are proprietary to WRDS and only available under license.

- 6. Are the items “direct replacement” parts/components for existing equipment? If so, provide the information about the Next Higher Assembly (NHA)/equipment which the replacement parts are going into (e.g., description, model, part number, Original Equipment Manufacturer (OEM), etc.).

No.

- 7. Provide any additional information to support a sole source/brand name sole source procurement. The rationale must justify “either” substantial duplication of cost to the Government that is not recovered through competition or unacceptable delays in fulfilling the mission of the agency.

Wharton Research Data Services (WRDS) is a business data research service from The Wharton School at the University of Pennsylvania. Developed in 1993 to support faculty research at Wharton, the service has evolved to become a common tool for research for over 400 institutions in 30+ countries around the world. Every major US MBA program, including 100% of the top 20 business schools subscribe to WRDS. Not having access to the same data integration package as other researchers puts the NPS at a significant disadvantage

TECHNICAL OR REQUIREMENTS CERTIFICATION

I CERTIFY THAT THE STATEMENTS CHECKED, AND INFORMATION PROVIDED ABOVE ARE COMPLETE AND CORRECT TO THE BEST OF MY KNOWLEDGE. I UNDERSTAND THAT THE PROCESSING OF THIS SOLE SOURCE/BRAND NAME SOLE SOURCE JUSTIFICATION PRECLUDES THE USE OF FULL AND OPEN COMPETITION.

Title: EResources Coordinator	Date: 2/08/2016

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CONTRACTING OFFICER APPROVAL:

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