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Government of Canada Materiel Management Community Competencies

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gouvernement du Canada

Government of Canada Materiel Management Community Competencies

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Introduction

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Purpose: Why do we need new competencies?

This document forms the basis for competency-based management for the materiel management community in the Government of Canada. It will help deputy heads and their senior designated officials for the management of materiel meet the requirements of the new [Policy on the Planning and Management of Investments](#), specifically, ensuring the “capacity, competency and knowledge of the department’s workforce in [...] materiel management.”

Materiel management practitioners can also use the competencies outlined in this document to align with their organizational objectives, human resources requirements and career interests in accordance with [competency-based management principles](#).

This document provides a comprehensive list of the functional and technical competencies needed for effective life-cycle management, including:

- considering trends, the environment, new technology and global issues such as pandemics
- meeting current and future requirements

Appendix A contains “knowledge statements” of functional and technical competencies. They are closely linked to the policy and legal framework outlined in Appendix B. Knowledge statements detail what knowledge and experience are needed for each level of proficiency regarding procedure, regulation, principles, mechanisms and programs.

This document will support a range of human resources activities:

- planning (succession planning, gap analysis)
- developing work descriptions
- assessing and selecting candidates
- writing performance objectives and assessments
- creating professional development plans
- recognizing employee contributions

The [Government of Canada Workplace Accessibility Passport](#) can help managers in these discussions when employees face accessibility barriers that can make it challenging to acquire necessary competencies.

Guiding principles

The principles that guide the Government of Canada’s materiel management community follow the Treasury Board’s [Policy on the Planning and Management of Investments](#) and the [Directive on the Management of Materiel](#). These principles help materiel management practitioners plan, acquire, operate, maintain and divest materiel in a way that supports the government’s programs and services while ensuring best value to the Crown. Materiel management practitioners should consider the following key guiding principles in all of their work related activities:

- Demonstrate best value and sound stewardship, considering the life-cycle costs of assets and services
- Uphold the obligations of the Crown with respect to Indigenous peoples
- Consider opportunities to advance government socio-economic, security and environmental objectives, such as accessibility and reducing greenhouse gas emissions

Materiel Management Community

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The management of materiel entails multiple roles and responsibilities within government organizations as they strive to ensure that materiel is planned, acquired, operated, maintained and divested in a manner that supports the delivery of programs and services to Canadians, while ensuring best value to the Crown. Given the complexity of the community, the competencies contained within this document have been categorized into task-based behaviours to provide clarity on how and where they should be applied.

Who should use this document?

- **Corporate business planners** to verify departmental strengths and gaps and develop solutions to address gaps
- **Classification advisors** to develop standards, generic job descriptions and profiles of competencies relevant to a position
- **Hiring managers** to identify the exact qualifications needed for vacant positions, assess applicants and interview candidates based on those qualifications
- **Materiel management specialists and their supervisors** to establish mandatory and optional learning needs, knowledge requirements and performance objectives
- **The Canada School of Public Service** to ensure that its course curriculum meets current and future professional development and learning needs
- **Other government departments working with the Treasury Board of Canada Secretariat** to define professional development requirements and support related initiatives
- **The Treasury Board of Canada Secretariat and departmental community leads** to develop career progression roadmaps to ensure a coordinated approach to community development

Ideally, all materiel management specialists should have or should be working toward all the competencies listed in this document to the highest proficiency level. They should also be evaluated on these competencies during performance reviews.

The document is one of many tools that help specialists in the Government of Canada's materiel management community improve their skills and abilities.

What's new in this 2025 update?

In this 2025 update, the materiel management knowledge requirements and statements have been improved:

- new behaviours that encourage cross-functional approaches and collaboration were added
- [Gender-Based Analysis Plus \(GBA Plus\)](#) was incorporated into the behavioural indicators and knowledge statements
- behaviours were updated to align with the 2021 *Directive on the Management of Materiel*, with more focus on life-cycle management and socio-economic outcomes

Materiel Management competency framework

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 - [1. Competencies specific to materiel management](#)
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 - [Proficiency Levels](#)

There are five categories of competencies aligned with the *Directive on the Management of Materiel* that materiel management practitioners need to fulfill their responsibilities. Materiel managers must use a mix of these skills to be at their highest levels of proficiency.

1. Competencies specific to materiel management

Employees, supervisors and managers working in materiel management need two types of specific competencies:

1. **Functional competencies** are the essential knowledge, skills, experience, and personal attributes and abilities needed for materiel management specialists to do their jobs. They cover all stages of managing materiel, such as planning and acquisition, operations and maintenance, and divestiture.
 1. Planning
 2. Acquisition
 3. Operation and Maintenance
 4. Divestiture
2. **Technical competencies** are the practical knowledge and skills needed to perform well in a specific job. They focus on the “know-how” needed for successful performance.
 1. Business acumen
 2. Risk Management
 3. Project Management
 4. Data Analytics
 5. Negotiation
3. Technical competencies are common across all [Investment Management Communities](#).

2. Supporting Competencies

Core competencies

Core competencies are the basic skills that all public servants need, no matter what their job is. Every government employee should have these competencies, as they are essential for leadership and specific materiel management tasks. Core competencies involve:

- how employees work with others
- how they perform their work to achieve their objectives

Key leadership competencies for supervisors, managers and executives

The [key leadership competencies](#) define the behaviours expected of leaders in Canada's public service leaders. No matter that their job is, executives, managers and supervisors are expected to model these competencies.

General competencies

[General competencies](#) are important for all employees, regardless of their job. Everyone, from entry-level employees to executives, should demonstrate these competencies.

Digital competencies for all public servants

[Digital competencies](#) (accessible only on the Government of Canada network) define the necessary digital skills, knowledge, attributes, and behaviors required in a modern public service, and in turn, ensure all public servants and their leaders can work efficiently in the digital age.

Proficiency levels

Proficiency is a high degree of competence and expertise in performing a function. Proficiency levels indicate how well someone can perform a task, with different levels indicating different levels of skill and familiarity.

There are three proficiency levels for each competency, which are designed to guide the development of employees toward becoming leaders and trusted advisors. The levels build on each other, so if someone is at Level 3, they are also proficient at Levels 1 and 2.

Foundational proficiency

At this level, the employee's behaviour is reactive. An entry-level or junior materiel management practitioner has a basic understanding of the field but will need considerable guidance and direction to perform daily tasks. The employee can follow clear procedures and step-by-step instructions from a more experienced professional, and they need training to work independently without frequent supervision.

Intermediate proficiency

At this level, the employee's behaviour is proactive. An intermediate-level materiel management practitioner has good grasp of the field and can complete tasks with minimal guidance. They handle unusual situations reasonably effectively by following organizational policies and procedures.

Advanced proficiency

At this level, the employee's behaviour is strategic. An advanced-level materiel management practitioner applies their extensive knowledge and skills to plan, organize, manage and oversee the work of others. They are seen as a leader and a resource to others. They turn complex ideas into practical solutions and are experts who guide, solve problems, predict issues and analyze trends strategically.

Material Management community competencies

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 - [Functional competencies for the materiel management community](#)
 - [Planning and governance \(life-cycle management Phase 1\)](#)
 - [Acquisition \(life-cycle management Phase 2\)](#)
 - [Operations and maintenance \(life-cycle management Phase 3\)](#)
 - [Divestiture \(life-cycle management Phase 4\)](#)
 - [Technical competencies for the materiel management community](#)
 - [1. Negotiations](#)
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 - [4. Data analytics](#)
 - [5. Business acumen](#)

Life-cycle management of materiel

Materiel management practitioners are responsible for planning and governance, acquisition, operations and maintenance, and divestiture of materiel (refer to subsection 4.2 of the [Directive on the Management of Materiel](#)). Materiel-specific competencies have been grouped under the following four phases of life-cycle management:

1. Planning

- Demand management
- Inventory planning
- Operations planning
- Capacity planning
- Transportation and networking design
- Logistics planning
- Sourcing strategies and plans
- Researching and evaluating accessibility criteria (identifying people and their needs through an intersectional lens)
- Disaggregated data analysis on end-user or stakeholder perspectives (feedback loop)

2. Acquisition

- Total cost analysis
- Environmental considerations
- Negotiating and contracting
- Risk management
- Sourcing decisions consistent with the Government of Canada's objectives
- Acquiring adaptive technologies to promote equity

3. Operations and maintenance

- Inventory management, control and optimization
- Process control
- Quality management
- Logistics
- Warehouse
- Distribution
- Third-party or outsourced management
- Order management
- Delivery management
- Receiving
- Controlled goods management
- Customs clearance

4. Divestiture

- Refit or reuse
- Divestment: transfer, sale, donation, or trade consistent with the Government of Canada's objectives
- Auction
- Third-party valuations
- Waste management
- Records management

Functional competencies for the materiel management community

- ▼ Planning and governance (life-cycle management Phase 1)

Planning and governance in life-cycle management involves:

- working with business owners to manage, forecast, plan, establish, implement and maintain the strategy for managing materiel throughout its life cycle
- ensuring that controlled goods are managed to prevent unauthorized access

Responsibilities

Responsibilities in the planning and governance of life-cycle management involves working with key departmental stakeholders to develop strategies for managing materiel, including:

- estimating the expected life and full life-cycle costs of materiel
- evaluating the performance, usage and environmental impact of materiel
- assessing the physical condition and financial performance of capital assets
- exploring options to acquire materiel to meet program needs
- identifying, assessing and managing risks

For further information, refer to subsections 4.2.1, 4.2.2 and 4.2.3 of the [Directive on the Management of Materiel](#).

Behavioural indicators

Foundational proficiency

Strategic planning and decision-making

- Gathers disaggregated data and assesses information, materiel requirements and potential risks to make informed decisions
- Plans for short-term and long-term materiel needs
- Uses a GBA Plus approach to understand the needs of people and integrates opportunities for collaboration into materiel management plans

Compliance and procedures

- Applies relevant legislation, policies and procedures
- Obtains information from various internal stakeholders to improve product information and identify any discrepancies

Sourcing and evaluation

- Identifies standard methods for sourcing, costing of goods (and services), and selecting suppliers that best meet program and business needs
- Works with business owners to develop criteria for evaluating materiel,

Continuous improvement and realization of benefits

- Focuses on continuous improvement, enhancing processes and practices related to the materiel management life cycle
- Focuses on achieving socio-economic, security and environmental benefits, aiming for equitable outcomes

Intermediate proficiency

Strategic planning and decision-making

- Helps develop budgets and financial requirements
- Creates effective strategies by analyzing data and trends, evaluating risks and setting priorities
- Identifies systemic barriers and inequalities
- Finds opportunities to collaborate with other functions and includes them in materiel management plans

Stakeholder engagement and compliance

- Consults with diverse stakeholders to gather detailed input to ensure alignment, ensuring alignment with department (program delivery) and Government of Canada objectives, and legislative requirements
- Ensures compliance with regulations related to distribution systems, trade tariffs, duties on imported goods, security, and international agreements

Operations and maintenance

- Oversees operations and maintenance to ensure optimal performance and resource use, and to manage risks effectively
- Coordinates warehousing, transportation and delivery of materiel
- Manages materiel based on its characteristics, availability, condition and performance history

Acquisition and stability

- Works with business owners to include greening strategies consistent with providing value for Canadians and to clearly define complex requirements
- Develops plans to acquire, redistribute or divest materiel, considering various needs
- Keeps accurate records of asset portfolios, ensuring timely and proper documentation

Advanced proficiency

Budgeting and financial management

- Helps develop budgets and financial requirements of the organization
- Defines and communicates work unit priorities, budget, roles and responsibilities

Strategic planning and decision-making

- Develops strategic solutions that align with government priorities and the organization's mandate
- Makes decisions based on evidence to align materiel plans and processes with available resources, considering equitable access
- Provides strategic advice for developing frameworks that align with long-term organizational priorities
- Provides strategic guidance on investments required to maintain the integrity of materiel and optimize operational efficiency and performance
- Develops action plans in response to audits
- Contributes to the development and update of departmental policies

Collaboration and stakeholder engagement

- Leads opportunities for collaboration with other functions to include them in materiel management plans
- Works collaboratively with diverse stakeholders to develop guidelines for complex requirements

Life-cycle and compliance management

- Monitors compliance with policies and procedures for the management of materiel
 - Develops strategies to measure efficiency, monitor compliance, and address challenges in an inclusive and respectful way
 - Creates life-cycle strategies for the organization or government, including industry trends and international regulations, focusing on inclusive and accessible practices
 - Ensures that strategies for life-cycle management include full life-cycle cost estimates, including environmental implications (refer to subsection 4.2.3.2 of the [Directive on the Management of Materiel](#))
 - Develops processes for complex requirements that involve unusual or volatile materiels
 - Provides subject matter expertise on strategies for life-cycle asset management
 - Integrates complex requirements into plans for sensitive situations
- ▼ Acquisition (life-cycle management Phase 2)

An acquisition is a transaction that adds assets or services to a department's or the Government of Canada's program or service delivery capabilities by:

- purchase
- lease

- o acceptance of a surrender or resiliation of a lease (ending a lease early)
- o licence
- o exchange
- o acceptance of a gift, devise, or legacy
- o easement
- o acceptance of a relinquishment of an easement or by abandonment of a servitude
- o expropriation
- o transfer of administration from another department or agent Crown corporation, or
- o a transfer of administration and control from the provincial Crown

Matériel management practitioner responsibilities

Responsibilities for managing matériel involve ensuring that decisions about matériel are made in a comprehensive way and include consideration of the following:

- o requirements
- o how the matériel will be used
- o options for acquiring the matériel
- o the risks involved
- o necessary investments
- o divestment [Footnote 1](#)

Behavioural indicators

Foundational proficiency

Procurement and supplier management

- o Provides quality assurance and testing of equipment on purchase orders for matériel, goods, supplies, equipment and services
- o Researches and identifies diverse suppliers to obtain quotes
- o Works with procurement officers, business owners and other stakeholders to manage storage and distribution
- o Follows up on deliveries and inspects goods to ensure they meet contract requirements and delivery documents

Compliance and documentation

- o Understands and follows policies and procedures in work activities
- o Ensures that purchase entries comply with financial structures to accurately track matériel in asset management systems, with an emphasis on processes
- o Tracks status of requisitions, contracts and orders

Communication and client service

- o Responds to or escalates enquiries within established time frames, maintaining respectful and inclusive communication

Intermediate proficiency

Information and guidance

- o Provides business owners and stakeholders with information on legislation, policies and procedures
- o Provides sound recommendations to business owners on how to track the life cycle, warranties, shelf life and other aspects of matériel management

Selection and acquisition

- o Selects matériel based on needs and performance criteria
- o Plans and carries out acquisition transactions according to established service levels for lead time, quality, reliability, delivery or performance

Procedural improvements

- o Suggests relevant procedural changes when appropriate, ensuring that all changes promote equitable outcomes

Advanced proficiency

Guidance and compliance

- o Provides business owners and stakeholders with clear guidance on legislation, policies and procedures
- o Ensures that controlled goods are acquired according to Appendix B: Mandatory Procedures for the Management of Controlled Goods of the *Directive on the Management of Matériel*
- o Protects the integrity of the matériel management process

Data analysis and reporting

- o Collects, analyzes and reports information to identify key patterns from disaggregated data and other sources
- o Submits information for updates to the organization's investment plan in support of matériel management strategies, ensuring inclusivity is considered

Acquisition and decision-making

- o Helps draft complex approval documents with input from diverse stakeholders
- o Selects matériel based on needs and performance specifications.
- o Decides on the most cost-effective way to acquire matériel, for example, purchase or lease or rental
- o Uses and documents analytics and data for defensible decision making
- ▼ Operations and maintenance (life-cycle management Phase 3)

Matériel management practitioner responsibilities

Responsibilities for managing matériel at the Phase 3 level are to:

- o implement measures to:
 - minimize the risk of discrepancies, damage and unauthorized access to matériel
 - ensure the serviceability of matériel
 - manage controlled goods and prevent unauthorized access throughout their life cycle
- o identify matériel that is no longer needed [Footnote 2](#)
- o manage matériel and operations in a sustainable and financially responsible way to support program delivery and operational requirements

- meet all reporting obligations

Behavioural indicators

Foundational proficiency

Asset verification and tracking

- Physically verifies assets, reconciles information and tracks shelf life, usage, condition, performance and warranty information
- Ensures that materiel records are maintained using automated systems, where practical and cost-effective, to track inventory and monitor costs, including turnover and discrepancies
- Tracks inventory that must be divested in the organization's automated asset management and financial systems
- Conducts stock checks according to a specific plan and identifies any discrepancies

Materiel management and maintenance

- Decides on the most effective maintenance methods for materiel
- Plans and schedules equipment inspections, testing, maintenance and warranty services
- Monitors warranties and the performance of materiel
- Protects controlled goods and reports any breaches according to Appendix B: Mandatory Procedures for the Management of Controlled Goods of the *Directive on the Management of Materiel*

Logistics and distribution

- Manages the reception, storage and dispatch of materiel
- Tracks the movement, storage, distribution, repairs, overhaul, shelf life and life expectancy of materiel within a warehouse
- Optimizes space by moving stock efficiently
- Coordinates transportation operations and the inflow of orders according to priorities
- Advises business owners on logistical liabilities during transit (Incoterms10^{Footnote 3}) to meet their needs
- Follows the organization's allocation planning process to meet client needs to obtain and distribute materiel appropriately

Planning and forecasting

- Forecasts changes in materiel and resource requirements based on diverse factors
- Monitors the allocation, distribution and scheduled use of materiel based on program or operational needs and assessments
- Applies relevant policies, processes, principles and methods to manage materiel
- Follows guidance to improve effectiveness and efficiency in a way that supports the needs of diverse stakeholders

Stakeholder engagement and compliance

- Works with business owners and stakeholders to identify materiel that needs special handling or is no longer needed
- Helps draft complex approval documents with input from diverse stakeholders
- Follows the requirements set out in Appendix A: Mandatory Procedures for Land Vehicle Fleet Management of the *Directive on the Management of Materiel* in tracking internal or external fleet resources

Intermediate proficiency

Operational strategies and planning

- Develops operational strategies, plans and processes to manage materiel, ensuring it meets the Government of Canada's objectives
- Uses a total systems approach to manage information, inventory and maintenance services
- Develops fleet requirements and a replacement strategy based on transport or distribution requirements, considering budgeting requirements for the life cycle of vehicles with attention to the Government of Canada's objectives

Materiel handling and maintenance

- Provides cost-benefit analysis and advice for complex materiel handling, movement, storage and divestment
- Ensures that materiel is maintained by planning equipment inspections, testing, maintenance and warranty services
- Provides guidance to reduce the time required for tasks by strategically placing frequently used items
- Ensures the monitoring of materiel use, stock levels and performance to ensure that materiel meets program requirements
- Reallocates underused materiel

Transportation and distribution

- Monitors transportation obligations to optimize the distribution network
- Develops strategies to reduce energy and emissions while optimizing capacity
- Advises business owners on logistical liabilities during transit (Incoterms10) to meet their needs

Inventory and discrepancy management

- Oversees stock-taking to ensure that discrepancies are resolved, and records are updated
- Investigates discrepancies to determine appropriate actions
- Tracks inventory that must be divested in the organization's automated asset management and financial systems

Stakeholder engagement and reporting

- Informs stakeholders about options and recommendations to operational processes
- Tracks outcomes to monitor impacts on stakeholders through feedback mechanisms
- Identifies surplus materiel

Advanced proficiency

Investment and resource optimization

- Addresses complex investments to make the best use of financial resources and sustain the life cycle of materiel
- Integrates sustainability and environmental, social and corporate governance performance to support organizational investment planning
- develops guidelines and strategies to optimize cost, allocate resources, replace fleets and divest resources in accordance with the Government of Canada's objectives

Supply chain and logistics management

- Plans supply processes based on distribution needs, considering diverse requirements

- Aligns strategies for network planning, facility design, client demand and transportation
- Develops the requirements for service providers to handle multi-modal global logistics across various stakeholders
- Develops a comprehensive strategy for global logistics and distribution
- Uses a total systems approach to manage the flow of information, material and services, including raw materials, suppliers, factories, warehouses and delivery to the client

Material handling and safety

- Develops guidelines for the safe handling and use of controlled goods in accordance with Appendix B: Mandatory Procedures for the Management of Controlled Goods of the *Directive on the Management of Materiel*
- Ensures that training is provided for proper materiel operation
- Develops processes for handling of heritage assets and artifacts, respecting cultural diversity

Information management and continuous improvement

- Develops systems for managing information and improving business processes, including resolving unique cross-functional issues, ensuring equitable and diverse approaches

Risk management and discrepancy prevention

- Oversees risk-based stock-taking across all locations
- Updates processes to prevent future discrepancies based on investigation results and reports discrepancies

• ▼ Divestiture (life-cycle management Phase 4)

Divestiture:

- identifies methods to sell, donate, transfer or otherwise divest of surplus materiel and tracks these processes
- ensures that surplus controlled goods are clearly identified and handled according to the requirements of Appendix B: Mandatory Procedures for the Management of Controlled Goods of the [Directive on the Management of Materiel](#)

Materiel management practitioner responsibilities

Responsibilities for managing materiel at the Phase 4 level are to:

- direct program leads to first consider the feasibility of repurposing, refitting and reusing all materiel
- document the analysis and reasons for divestiture decisions
- divest surplus materiel in an environmentally and sustainable way that is open, transparent and fair, and that optimizes overall benefits to the Crown [Footnote 4](#)

Behavioural indicators

Foundational proficiency

Divestiture preparation

- Helps business owners prepare materiel for GCTransfer, GCSurplus or other divestiture method, following organizational policies and legislation, including the Government of Canada's objectives
- Prepares materiel for divestiture by removing all official Government of Canada symbols except for heritage materials being donated
- Ensures that controlled goods are clearly identified in accordance with Appendix B: Mandatory Procedures for the Management of Controlled Goods of the *Directive on the Management of Materiel*

Documentation and record-keeping

- Documents auditable records of the analysis used to justify divestiture decisions, including valuations for materiel that has not exceeded its expected life
- Removes materiel from inventory and financial systems

Intermediate proficiency

Divestiture planning and evaluation

- Works with diverse stakeholders to create divestiture plans, ensuring business owners first consider repurposing, refitting and reusing all materiel before other options
- Evaluates materiel before divestiture if it has not exceeded its expected life

Research and life-cycle management

- Researches new trends and developments to ensure that surplus materiel is divested in an appropriate, open, transparent, inclusive, equitable and fair way
- Helps business owners determine the life cycle of complex goods

Advanced proficiency

Strategic development and enhancement

- Develops strategies and procedures to handle exceptionally complex divestment, considering intersectional perspectives such as socio-economic and environmental impacts and cultural diversity
- Develops strategies for the continuous enhancement of divestment practices, ensuring they are respectful and equitable
- Develops a strategy to reallocate surplus materiel, such as internal repurposing, reusing, refitting or transferring to other government organizations

Compliance and guidance

- Provides guidance on legislative, regulatory and policy frameworks

Develops cost-benefit analysis processes for determining best divestiture methods for business owners and stakeholders, in accordance with legislation, regulations and organizational policies and guidelines

Financial and cultural management

- Maximizes investment recovery in divestment
- Uses the proceeds of divestment in accordance with organizational policies
- Manages the donation of Indigenous artifacts to the appropriate Indigenous community or organization, ensuring culturally sensitive practices

Technical competencies for the materiel management community

• ▼ 1. Negotiations

Negotiation in materiel management:

- ensures that differences are settled between parties to achieve results and gain mutual acceptance
- involves actively communicating, persuading, influencing and exploring positions and alternatives to obtain best value, in accordance with policies and the legal framework, and in the best interests of Canadians and the Government of Canada

Materiel management practitioner responsibilities

Responsibilities for managing materiel and negotiation involve ensuring that the market value of materiel is used as the basis of contract negotiation for trade-ins and accounted for in the proceeds of divestment^{[Footnote 5](#)}.

Behavioural indicators

Foundational proficiency

Information-gathering and strategy

- Collects information from the client on relevant issues and desired results
- Uses knowledge of counterparts' motivations to select an appropriate negotiation strategy

Communication and understanding

- Listens to different points of view and promotes mutual understanding
- Clearly expresses own views without criticizing others' opinions

Negotiation and implementation

- Negotiates objectively and ethically with professionalism, respect and equity
- Stays flexible to reach agreements
- Implements the agreement as negotiated

Intermediate proficiency

Strategic planning and knowledge application

- Uses own knowledge and business acumen to develop strategies to achieve clear and well-understood negotiated agreements
- Applies knowledge of goods and services to improve negotiation outcomes
- Identifies the best alternative to a negotiated agreement (BATNA) if needed

Negotiation skills and conflict resolution

- Skillfully negotiates complex situations by questioning different viewpoints to reach mutual agreements
- Resolves complex situations by addressing challenges openly and constructively while encouraging different opinions
- Recognizes potential conflicts and finds ways to help parties work through issues, clarifying assumptions and expectations

Advanced proficiency

Cultural awareness and adaptability

- Uses knowledge of different cultures during negotiations to help reach consensus and cooperation
- Adapts negotiation style to fit different people and situations

Constructive negotiation and relationship-building

- Conducts complex negotiations openly and constructively
- Reaches successful agreements while maintaining positive working relationships

Creative solutions and long-term focus

- Uses past experiences to create solutions that benefit everyone
- Keeps everyone focused on long-term objectives and resolves disagreements when negotiations stall

• ▼ 2. Project management

Managing projects in materiel management:

- ensures that the workforce can initiate, plan, carry out, control, evaluate and close a series of activities
- manages risks to meet specific objectives, criteria and deadlines

Project manager practitioner responsibilities

Responsibilities for project management in materiel management are to:

- help initiate, plan, carry out, control, monitor, evaluate and close a series of activities
- address and resolve risks to achieve objectives and meet criteria within a specific time
- define constraints such as scope, time, quality and budget to use resources effectively
- uses relevant information to help complete the project in compliance with objectives

Behavioural indicators

Foundational proficiency

Project planning and risk management

- Helps define project scope, tasks, timelines and deliverables for materiel management
- Suggests equitable solutions to manage project risks and to ensure successful completion

Stakeholder and financial management

- Identifies key internal stakeholders and their interdependencies
- Records materiel management expenses in a system and generates reports efficiently

Intermediate proficiency

Project methodology and monitoring

- Advises on new project management methods to clarify and improve complex materiel management constraints and task breakdowns
- Tracks the effects of project changes on materiel management using critical paths, key performance indicators and data collection methods

Communication and reporting

- Prepares and presents clear briefing documents and status updates to senior management

Collaboration and innovation

- Builds and maintains effective, inclusive and collaborative networks with project team members and external stakeholders
- Shows flexibility and innovation while ensuring due diligence

Advanced proficiency

Project initiation and planning

- Uses knowledge of materiel management to help initiate projects and contribute to the overall project plan in alignment with life-cycle management
- Provides strategic advice to integrate life-cycle management activities into project documents

Financial and governance strategies

- Identifies funding sources, governance and approvals to develop strategies that provide the best overall value
- Assesses the life-cycle costs of projects and recommends sustainable solutions

• ▼ 3. Risk management

Managing risk in materiel management:

- ensures the ability to assess and control risks throughout all phases of the materiel management life cycle [Footnote 6](#)
- arrives at evidence-based decisions to handle risks by assuming, avoiding, transferring, mitigating or sharing risks or by compensating for them

Materiel management practitioner responsibilities

Responsibilities for risk management in materiel management are to:

- ensure that the strategy for life-cycle management includes identifying, assessing and managing risks
- determine the best way to reduce risks
- make evidence-based decisions to handle risks by assuming, avoiding, transferring, mitigating or sharing risks or by compensating for them

Behavioural indicators

Foundational proficiency

Risk identification and analysis

- Identifies, analyzes, explains and manages risks from a perspective of managing materiel throughout its life cycle
- Identifies common risks in contracts and project delivery, such as scope, cost and schedule, related to materiel management

Risk monitoring and management

- Helps monitor and manage risks for non-complex materiel
- Works with stakeholders to contribute to risk registers for requirements

Decision support

- Recommends corrective actions to support equitable decision-making

Intermediate proficiency

Risk management development and implementation

- Analyzes, develops and implements risk management approaches for materiel management and life-cycle requirements
- Uses best practices to develop environmental scans and a risk management plan

Risk monitoring and adjustment

- Monitors activities and risks, adjusting strategies as new information becomes available
- Includes strategies for protecting the environment and the organization in risk mitigation strategies

Decision support

- Makes clear and concise risk-benefit management recommendations to management

Advanced proficiency

Risk management practices and learning

- Promotes sound risk management approaches, practices and learning, emphasizing sustainability
- Consults with other jurisdictions and businesses to align with the best risk management practices
- Shares lessons learned with other internal stakeholders to ensure a global approach to risk management

Strategic decision-making and continuity

- Aims to make the most of opportunities to ensure business continuity, sustainability and reputation in high-risk contexts
- Considers political, social, environmental and economic risks and issues and their impact in decision-making

• ▼ 4. Data analytics

Data analytics in materiel management:

- uses technology to analyze data and support of decision-making, procurement strategies, trends, supply chains and risk management
- ensures a strong capability to provide insights and improve outcomes

Materiel management practitioner responsibilities

Practitioner fulfilling their responsibilities in materiel management ensures that the strategy for life-cycle management includes performance information on:

- the functionality, utilization and environmental impact of all the organization's materiel
- the physical condition and financial performance of capital assets over their life-cycle, allowing for year-over-year comparison with government-wide benchmarks [Footnote 7](#)

Behavioural indicators

Foundational proficiency

Data collection and management

- Collects and records data through the materiel's life cycle to analyze information and develop inclusive strategies
- Ensures data accuracy and availability of pertinent documentation
- Ensures that data is entered accurately and protected in the appropriate database systems
- Uses the most relevant technology to gather data from internal and external sources and propose solutions

Data analysis and presentation

- Validates data analytics and identifies gaps in data
- Selects and adjusts data format for optimal clarity (using tables, charts and graphs)

Intermediate proficiency

Data analysis and strategy

- Analyzes various statistical and organizational information to meet client needs, ensuring inclusivity and consideration of the Government of Canada's objectives
- Uses data analytics to create asset management plans
- Identifies relationships and trends to find the cause of problems and suggest solutions

Data management and accuracy

- Ensures that the correct data is used for input and analysis
- Leads stakeholders in using innovative data analysis techniques

Communication and support

- Provides clear and understandable explanations to questions

Advanced proficiency

Materiel management strategy development

- Combines data analytics, supply and demand knowledge, government priorities and stakeholder perspectives to develop effective materiel management strategies
- Considers assumptions, new applications and emerging technologies to make the materiel management process more efficient and responsive

Data analytics leadership and consultation

- Promotes the use of data analytics in materiel management
- Leads consultations on complex data analytics to suggest changes to policies or business processes, considering diverse perspectives

• ▼ 5. Business acumen

Business acumen in materiel management:

- requires a clear and applicable understanding of how industry and the Government of Canada work to meet their respective goals
- requires a thorough knowledge of the industry, government machinery, trends, economic sectors, money flows and market dynamics that influence public procurement
- brings that thorough knowledge to procurement strategies to increase competition and encourage innovation and best value to Canada

Business acumen responsibilities

Responsibilities for business acumen in materiel management are to:

- understand how business and the federal public service operate
- know government processes, trends, economic factors, money flow and market dynamics
- use this knowledge to manage or lead strategies in materiel management and supply chain principles
- achieve best value by ensure that daily tasks are effective and efficient and that competition is considered

Behavioural indicators

Foundational proficiency

Business fundamentals and strategic recommendations

- Uses basic business principles, such as planning, supply and demand, marketing, debt, cash flow, and profit, to advise business owners
- Keeps up to date with new trends and technologies to better meet business owners' needs, incorporating sustainability and innovation

Sustainability and innovation in life-cycle management

- Incorporates sustainability into life-cycle management to ensure best value for Canada and to promote environmental stewardship
- Actively looks for and communicates opportunities to innovate in life-cycle management

Intermediate proficiency

Leveraging knowledge and strategic planning

- Uses knowledge of the organization and industry to obtain best value for business owners
- Develops business requirements and strategic and operational plans, considering challenges, opportunities and trends in industry and government
- Develops long-term strategic plans that align with future investments, activities, issues, challenges and opportunities

Networking and market awareness

- Builds and maintains professional networks to gather market information about the market and identify new opportunities, emphasizing inclusion

Advanced proficiency

Strategic planning and risk management

- Plans strategies by examining local and global economic trends, best practices, diverse stakeholders, and the Government of Canada's objectives
- Identifies and manages risks using expertise in industry and government priorities, dynamics, and operations

Leading change and innovation

- Leads change using knowledge of government processes, budgets, investment plans, mandate letters and priorities to advise business owners
- Uses innovative methods to influence organizational change and guide senior management and other stakeholders

Appendix A: Materiel Management Knowledge Requirements and Statements

- ▼ In this section
 - [Materiel management: overall general knowledge](#)
 - [Functional competencies](#)
 - [Technical competencies](#)

The following knowledge requirements support the functional and technical competencies listed in this document. Some knowledge requirements may appear under multiple competencies, allowing readers to focus on only one section if they prefer. The knowledge statements are organized as follows:

1. Materiel management: overall general knowledge
2. Functional competencies
 - Planning and governance
 - Acquisition
 - Operations and maintenance
 - Divestiture
3. Technical competencies
 - Data analytics
 - Business acumen
 - Project management
 - Risk management
 - Negotiation

- ▼ 1. Materiel management: overall general knowledge

Management principles and practices

- Supply chain management principles, processes, methodologies and practices
- Competency-based management principles, processes, methodologies and practices
- Program management principles
- Principles of the life-cycle management of assets
- Just-in-time management

Legal, policy and regulatory frameworks

- Materiel management legal and policy framework
- Health and safety policies, programs and regulations
- Applicable accessibility standards
- The Government of Canada's socio-economic, security and environmental objectives

Information and decision-making

- Information and access to information management
- Knowledge of data analysis and application to decision-making

Communication and leadership

- Effective communication theories and practices
- Leadership theories and practices

Inclusivity and analysis

- Gender-Based Analysis Plus (GBA Plus) principles
- ▼ 2. Functional competencies

2.1 Planning and governance

Governance and strategic frameworks

- Departmental and Government of Canada governance structures
- Departmental materiel management framework
- Departmental materiel management strategy
- Department or agency investment plans

Compliance and regulatory requirements

- Controlled goods and dangerous goods requirements
- Security management regulations
- Heritage-designated asset and Indigenous artifact requirements
- Standards of quality assurance

Roles and responsibilities

- Roles of common service providers
- Roles of other government departments in materiel management processes

Financial and cost management

- Life-cycle cost estimates

2.2 Acquisition

- **Methods of acquisition**
- For acquisition competencies, behaviours and knowledge, consult the [Government of Canada Procurement Competencies](#)

2.3 Operations and maintenance

Fleet and logistics management

- Fleet and transportation management
- Logistics strategy development and implementation

Inventory and warehousing

- Warehousing and materiel-handling management
- Inventory control and monitoring

Information and security management

- Information management, collection, tracking and analysis for costing
- Security of assets

2.4 Divestiture

Asset management and disposal

- Donation management (cultural property export and import, social responsibility, and Indigenous communities)
- Transfer management (GCTransfer and GCSurplus)
- Divestiture management (asset identification, disposition, and sales or donation practices)

Assets sale management

- Surplus identification and disposal management

Regulatory and compliance considerations

- Trade agreements, tariffs, duties and security regulations
- Extraterritorial limitations of divesting of internationally acquired controlled goods

Sustainability economy

- Circular economy

• ▼ 3. Technical competencies

3.1 Negotiations

Dispute resolution and negotiation

- Alternative dispute resolution principles and methodology
- Negotiation techniques, strategies, approaches and tactics
- International trade dispute resolution mechanisms

Financial and profit management

- Costing and profit principles

Stakeholder engagement

- Stakeholder engagement and relationship management

3.2 Project management

Project management fundamentals

- Project management principles, processes, methodology, applications and lexicon
- Project life-cycle, including project phases and gates
- Project resource roles and responsibilities

Client and stakeholder engagement

- Clients' requirement definition
- Stakeholder engagement and relationship management

Approvals

- Project approval guidelines and process

3.3 Risk management

Risk management

- Risk identification, assessment and planning principles

- Risk-based decision-making principles
- Risk and risk mitigation principles
- Integrated risk management

Procurement management

- Liability in Crown procurement management

Quality management

- Quality assurance and control principles

3.4 Data analytics

Information technology and data management

- Information technology principles, policies and tools
- Web analytics and data management approaches in support of decision-making
- Principles of life-cycle management for data collection and treatment
- Data input practices for asset sourcing options
- Data safeguarding practices

Reporting and compliance

- Trade agreement reporting management
- Government reporting requirements and guidelines

3.5 Business acumen

Knowledge of government and innovation

- Knowledge of the government's priorities and business standards and linkages to materiel management
- Knowledge of the government's innovation agenda
- Understanding of domestically emerging markets analysis related to materiel management

Management practices

- Performance management practices and techniques
- Stakeholder engagement and relationship management

Appendix B: Policy and Legal Framework

Legislation

- *Access to Information Act*
- *Canada Labour Code*
- *Canadian Environmental Protection Act*
- *Canadian Free Trade Agreement*
- *Civil Code of Québec*
- *Conflict of Interest Act*
- *Competition Act*
- Comprehensive land claims agreements
- *Copyright Act*
- *Criminal Code*
- *Cultural Property Import and Export Act*
- *Defence Production Act*
- *Department of Justice Act*
- *Canadian Environmental Assessment Act*
- *Export and Import Permits Act*
- *Federal Accountability Act*
- *Financial Administration Act*
- *Historic Sites and Monuments Act*
- *Income Tax Act*
- International trade agreements
- *Library and Archives of Canada Act*
- *Museums Act*
- *Department of Public Works and Government Services Act*
- *Surplus Crown Assets Act*
- *Accessible Canada Act*

Policy

- *Canadian Content Policy*
- *Policy on the Planning and Management of Investments* and its supporting directives
- Federal Contractors Program
- *Framework for the Management of Risk*
- *Industrial and Technological Benefits Policy*
- *Policy on Government Security*
- *Policy on Green Procurement*
- *Policy on Gender-Based Analysis Plus*

Regulations

- Government Contracts Regulations
- Controlled Goods Regulations
- *US International Traffic in Arms Regulations (ITAR)*
- *Canada Occupational Health and Safety Regulations*
- *Public Property Loans Regulations*

Guidance

- *Guide to Materiel Management Frameworks*
- *Mandatory Procedures for Investment Plans*

Appendix C: Definitions

assets

Tangible and intangible items of value, excluding money or records, that have an expected life beyond one year, whether they are Crown-owned, leased or accessed through other arrangements.

behavioural indicators

Statements that suggest how a competency might be observed at the different proficiency levels.

best value

The extent to which a solution or investment achieves the optimal balance of resource expenditure and realization of outcomes, including socio-economic and environmental returns, throughout the asset or service life cycle. For acquisitions, the lowest price is not always representative of best value.

business acumen

Keeness and quickness in understanding and dealing with a business situation (risks and opportunities) in a way that is likely to lead to a good outcome.

business owner

An individual who is responsible for the business or program area for which the project, procurement or programme is established. The business owner is responsible for:

- defining the required capabilities, intended business outcomes, and benefits of a project, procurement or programme at its outset
- the achievement of the business outcomes and benefits following implementation

Comptrollership Community Development Office

The unit in the Treasury Board of Canada Secretariat, under the Office of the Comptroller General, that is responsible for the professional development of the procurement community, including the community's competencies.

capacity

The specific ability of an entity (person or organization) or resource to do something, measured in quantity and level of quality, over an extended period.

controlled goods

Goods, including components and their associated technologies (for example, blueprints, technical specifications), that primarily have a military or national security significance, including "defence articles" that are controlled by the United States International Traffic in Arms Regulations (ITAR). The Controlled Goods List contained in the Schedule to the *Defence Production Act* details the specific controlled goods that are domestically controlled.

competencies

The abilities, skills, knowledge and personal traits that contribute to performance excellence.

core competencies

Competencies that the [Directive on Performance Management](#) has deemed mandatory for all employees, regardless of level or occupation, to demonstrate to be productive and perform their duties in the service of Canadians.

Core competencies are essential for all employees of the federal public service. They relate to how employees interact with their colleagues, and how they perform their work to achieve their work objectives. In performance management, core competencies are assessed because **how** work gets done is just as important as **what** work gets done.

disposal

The removal of an asset from a department's holdings. In the context of real property, a transaction that alienates real property from a department's inventory by sale, lease, surrender or resiliation of a lease, licence, exchange, gift, easement, relinquishment of an easement, abandonment of servitude, transfer of administration to another department or an agent Crown corporation, or transfer of administration and control to the provincial Crown.

divestment

Also called divestiture, divestment is the disposal of materiel, including controlled goods, in any of a variety of ways through transfer, donation, trade-in, sale, recycling, full demilitarization or conversion to waste.

donation

The provision by contribution, gift or bequest by a person, group or organization of funds, goods, facilities or services without cost to the recipient. The contribution is made without expectation of any benefit in return (other than public acknowledgement, if agreed to by both parties, and a tax receipt if applicable). Recipients may include other levels of government, Indigenous organizations, other national governments or charitable organizations.

data analytics

The process of using technology to examine large and varied data sets to uncover hidden patterns, unknown correlations, market trends, customer preferences and other useful information that can help organizations make more informed business decisions.

environmental performance

A measure that assesses the environmental condition, the presence of pollutants and hazardous materials on or in the materiel, and the potential for the materiel to emit pollutants, including greenhouse gases.

evaluation criteria

In the context of procurement, a benchmark, standard or yardstick against which the accomplishment, conformance, performance and suitability of a person, alternative, activity, product or plan is measured to select the best supplier. Criteria may be qualitative or quantitative in nature.

fleet

For the purposes of this policy and its associated directives, a group of vehicles owned or leased by a department, agency or other government organization.

functional competencies

Competencies that are specific to a particular community or type of work and describe the knowledge, skills and abilities vital to fulfilling required job tasks, duties or responsibilities of an occupation or profession.

functional specialist

An expert in a specific discipline, such as procurement, human resources, finance or information technology.

functionality

A performance measure that assesses how effectively an asset meets defined program and service requirements.

Gender-Based Analysis Plus (GBA Plus)

An analytical tool used to support the development of responsive and inclusive policies, programs, and other initiatives. GBA Plus is a process for:

- understanding who is impacted by the issue or opportunity being addressed by the initiative
- identifying how the initiative could be tailored to meet diverse needs of the people most impacted
- anticipating and mitigating any barriers to accessing or benefiting from the initiative

GBA Plus is an intersectional analysis that goes beyond biological (sex) and socio-cultural (gender) differences to consider other factors, such as age, disability, education, ethnicity, economic status, geography (including rurality), language, race, religion and sexual orientation.

goods

Items delivered or to be delivered under a contract.

governance

The way in which departments organize themselves to collaboratively conduct and implement a policy, project, programme, framework or horizontal initiative, including the planning, development and implementation of process and control structures for decision-making, reporting and evaluation.

heritage value

A value determined by assessing the aesthetic, historic, scientific, cultural, social or spiritual importance or significance for past, present and future generations.

In the context of real property, heritage value is embodied in character-defining materials, forms, location, spatial configurations, uses, and cultural associations or meanings.

In the context of materiel, heritage value is the value assigned to a resource derived from its association with an aspect or aspects of human history, including historical associations, aesthetic and functional qualities or significance, environmental associations, scientific significance, and spiritual or cultural associations.

Heritage value can reflect both physical (tangible) as well as symbolic (intangible) attributes. It can be derived from an association with many periods in history, a single episode, or from the interaction of nature and human activities. The heritage value of a resource is determined through evaluation using established criteria that set out which items are to be considered heritage resources and what constitutes their heritage value.

iterative approach

The practice of incrementally building, refining and improving a project, product, process or initiative with the goal of obtaining the desired outcome.

interpersonal or personal competencies

The social skills and abilities needed to interact positively and work effectively with other individuals or groups. Examples include communicating with others, sensitively to cultural differences, flexibility when faced with change, effective verbal and non-verbal communications skills, and ability to accept constructive feedback.

key leadership competencies

The behaviours that are expected of leaders in Canada's public service. These competencies serve as the basis for the selection, learning, development, and performance and talent management of executives and other senior leaders.

learning

The process of acquiring new or modifying existing knowledge, behaviours, skills, value or preferences.

life-cycle costs

The total cost of ownership over the life of an investment.

life-cycle management

The management of investments along the entire continuum, including planning, acquisition, use and maintenance, and disposal or divestment or close-out.

light-duty vehicle

Consists of on-road passenger and cargo-carrying vehicles with a gross vehicle weight rating (GVWR) up to 4,535 kilograms (10,000 pounds), including, but not limited to, sedans, hatchbacks, station wagons, vans, pick-up trucks, multi-purpose vehicles, sport utility vehicles, light-duty cube vans and motorcycles.

market value

The most probable price that an asset should bring in a competitive and open market as of the specified date under all conditions requisite to a fair sale, with the buyer and seller each acting prudently and knowledgeably, and assuming the price is not affected by undue stimulus.

materiel

All movable assets (excluding money, records and seized assets) acquired by His Majesty in right of Canada.

materiel management specialist

An individual who is responsible for the management of the Crown's movable and immovable assets throughout their life-cycle. They ensure that movable assets are used efficiently and effectively when supporting program delivery. They track and safeguard their department's materiel assets, including controlled goods and those that have recognized heritage value. They also ensure that at the end of the life-cycle, the transfer or disposal of surplus materiel is effective and obtains the best value for the Crown.

physical condition

A performance measure that identifies the physical state of repair and environmental condition of an asset relative to its current and long-term service delivery requirements.

physical performance

The performance of an asset based on its physical state of repair and operating efficiency relative to its current and long-term service delivery requirements.

program

Individual or groups of services, activities or combinations thereof that are managed together within the department and that focus on a specific set of outputs, outcomes or service levels.

programme

A group of related projects and change management activities that together achieve beneficial results for a department.

procurement

The process related to obtaining goods, services or construction from the planning to the completion of the procurement life cycle.

project

An activity or series of activities that has a beginning and an end. A project is required to produce defined outputs and realize specific outcomes in support of a public policy objective, within a clear schedule and resource plan. A project is undertaken within specific parameters for time, cost and performance.

professional development

The process of improving and increasing capabilities through a wide variety of specialized training, formal education or advanced professional learning to help functional specialists improve their professional knowledge, competence, skill and effectiveness.

proficiency

Is a high degree of competence or skill and expertise in performing a function.

proficiency level

The different degrees of familiarity with and ability to perform a function.

profile

A short description of someone's education, knowledge, skill, abilities and personal traits that contribute to performance excellence of a specific function.

risk

The uncertainty that can create exposure to undesired future events and outcomes. Risk is the expression of the likelihood and impact of an event that has the potential to affect the achievement of a department's objectives.

senior designated official

A person responsible for supporting the deputy head in fulfilling their function-specific policy requirements.

talent management

An organization-wide, holistic strategy for hiring, training and retaining top-performing employees.

technical competencies

Mandatory skills or abilities required to do the work based on a particular job or position and that might apply to more than one function.

training

An organized activity aimed at imparting information and instructions to improve the recipient's performance or to help him or her attain a required level of knowledge or skill.

Footnotes

Footnote 1

Refer to subsection 4.2.4 of the [Directive on the Management of Materiel](#).

[Return to footnote 1 referrer](#)

Footnote 2

Refer to subsections 4.2.5, 4.2.6 and 4.2.7 of the [Directive on the Management of Materiel](#).

[Return to footnote 2 referrer](#)

Footnote 3

Incoterms are a set of 11 internationally recognized rules that define the responsibilities of sellers and buyers. Incoterms specify who is responsible for paying for and managing the shipment, insurance, documentation, customs clearance and other logistical activities.

[Return to footnote 3 referrer](#)

Footnote 4

Refer to subsections 4.2.8 through 4.2.26 of the [Directive on the Management of Materiel](#).

[Return to footnote 4 referrer](#)

Footnote 5

Refer to subsection 4.2.24 of the [*Directive on the Management of Materiel*](#).

[Return to footnote 5 referrer](#)

Footnote 6

Refer to 4.2.3.6 of the [*Directive on the Management of Materiel*](#).

[Return to footnote 6 referrer](#)

Footnote 7

Refer to subsections 4.2.3.3 and 4.2.3.4 of the [*Directive on the Management of Materiel*](#).

[Return to footnote 7 referrer](#)