

PHILIPPINE BIDDING DOCUMENTS

Procurement of Consulting Services for the DOST- STII Projects for CY 2024

(STII-REI-2024-014)

Part I

Government of the Republic of the Philippines

**Fifth Edition
August 2016**

Preface

These Philippine Bidding Documents (PBDs) for the procurement of Consulting Services through Competitive Bidding have been prepared by the Government of the Philippines (GoP) for use by all branches, agencies, departments, bureaus, offices, or instrumentalities of the Government, including government-owned and/or -controlled corporations (GOCCs), government financial institutions (GFIs), state universities and colleges (SUCs), local government units (LGUs), and autonomous regional government. The procedures and practices presented in this document have been developed through broad experience, and are for mandatory use in projects that are financed in whole or in part by the GoP or the World Bank or any foreign government/foreign or international financing institution in accordance with the provisions of the 2016 Revised Implementing Rules and Regulations (IRR) of Republic Act 9184 (R.A. 9184).

The Bidding Documents shall clearly and adequately define, among others: (a) the objectives, scope, and expected outputs and/or results of the proposed contract; (b) the minimum eligibility requirements of bidders, such as track record to be determined by the Head of the Procuring Entity; (c) the expected contract duration, delivery schedule and/or time frame; and (d) the obligations, duties, and/or functions of the winning bidder.

In order to simplify the preparation of the Bidding Documents for each procurement, the PBDs groups the provisions that are intended to be used unchanged in Section II. Eligibility Documents of Part I; and **Error! Reference source not found.** (ITB) and **Error! Reference source not found.** (GCC) of Part II. Data and provisions specific to each procurement and contract should be included in Section III. Eligibility Data Sheet (EDS) of Part I, **Error! Reference source not found.** (BDS), and **Error! Reference source not found.** (SCC) of Part II. The forms to be used are provided in the attachments.

Care should be taken to check the relevance of the provisions of the Bidding Documents against the requirements of the specific Consulting Services to be procured. The following general directions should be observed when using the documents:

- (a) All the documents listed in the Table of Contents are normally required for the procurement of Consulting Services. However, they should be adapted as necessary to the circumstances of the particular Project.
- (b) These PBDs are divided into Part I and Part II, which shall be both made available from the time the Request for Expression of Interest is first advertised/posted until the deadline for the submission and receipt of bids
- (c) Specific details, such as the “name of the Procuring Entity” and “address for proposal submission,” should be furnished in the EDS, BDS, and SCC. The final documents should contain neither blank spaces nor options.
- (d) This Preface and the footnotes or notes in italics included in the Request for Expression of Interest, EDS, BDS, SCC, Terms of Reference, and Appendices are not part of the text of the final document, although they contain instructions that the Procuring Entity should strictly follow. The Bidding Documents should contain no footnotes except **Error! Reference source not found.** of Part II since these provide important guidance to Bidders.

- (e) The criteria for evaluation and the various methods of evaluation in the ITB should be carefully reviewed. Only those that are selected to be used for the procurement in question should be retained and expanded, as required in the BDS. The criteria that are not applicable should be deleted from the BDS.
- (f) The cover should be modified as required to identify the Bidding Documents as to the names of the Project, Contract, and Procuring Entity, in addition to date of issue.
- (g) If modifications must be made to bidding procedures, they can be presented in the BDS. Modifications for specific Project or Contract should be provided in the SCC as amendments to the Conditions of Contract. For easy completion, whenever reference has to be made to specific clauses in the EDS, BDS, or SCC these terms shall be printed in bold type face on Section II. Eligibility Documents, Section I. Instructions to Bidders, and Section III. General Conditions of Contract, respectively.

TABLE OF CONTENTS

PART I

SECTION I. REQUEST FOR EXPRESSION OF INTEREST	5
SECTION II. ELIGIBILITY DOCUMENTS	10
SECTION III. ELIGIBILITY DATA SHEET.....	17

Section I. Request for Expression of Interest

Notes on Request for Expression of Interest

The Request for Expression of Interest provides information that enables potential Bidders to decide whether to participate in the procurement at hand. The Request for Expression of Interest shall be:

- (a) Posted continuously in the Philippine Government Electronic Procurement System (PhilGEPS) website and the website of the Procuring Entity concerned, if available, and the website prescribed by the foreign government/foreign or international financing institution, if applicable, seven (7) calendar days starting on the date of advertisement; and
- (b) Posted at any conspicuous place reserved for this purpose in the premises of the Procuring Entity concerned for seven (7) calendar days, as certified by the head of the Bids and Awards Committee (BAC) Secretariat of the Procuring Entity concerned.
- (c) Advertised at least once in a newspaper of general nationwide circulation which has been regularly published for at least two (2) years before the date of issue of the advertisement, subject to Sections 21.2.1(c) of the IRR of R.A. 9184¹;

Apart from the essential items listed in the Bidding Documents, the Request for Expression of Interest should also indicate the following:

- (a) The date of availability of the Bidding Documents, the place where it may be secured and the deadline for submission of the Expression of Interest (EOI) together with the application for eligibility;
- (b) The set of criteria and rating system for short listing of prospective bidders to be used for the particular contract to be Bid, which shall consider the following, among others:
 - (i) Applicable experience of the consultant and members in case of joint ventures, considering both the overall experiences of the firms or, in the case of new firms, the individual experiences of the principal and key staff, including the times when employed by other consultants;

¹ Two years after effectivity of the 2016 Revised IRR of RA 9184 on **28 October 2016**, advertisement in a newspaper of general nationwide circulation shall no longer be required. However, a Procuring Entity that cannot post its opportunities in the PhilGEPS for justifiable reasons shall continue to publish its advertisements in a newspaper of general nationwide circulation.

- (ii) Qualification of personnel who may be assigned to the job vis-à-vis extent and complexity of the undertaking; and
- (iii) Current workload relative to capacity;
- (c) The number of consultants to be short listed and the procedure to be used in the evaluation of Bids of short listed consultants, *i.e.*, QBE or QCBE; and if QCBE, the weights to be allocated for Technical and Financial Proposals; and
- (d) The contract duration.

In the case of WB funded projects, the Request for Expression of Interest shall be sent to all who have expressed an interest in undertaking the services as a result of any General Procurement Notice issued. In addition, it shall also be sent to all heads of associations of consultants within the area where the project will be undertaken.



REQUEST FOR EXPRESSION OF INTEREST

1. The **DOST-Science and Technology Information Institute** through the **General Appropriations Act of CY 2024**, intends to apply the sum of **Three Million Pesos (P3,000,000.00)** being the Approved Budget for the Contract (ABC) to payments under the contract for **Procurement of Consulting Services for the DOST-STII Projects for CY 2024**. Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.

No.	Item/Description	Fund Source	Approved Budget for the Contract (ABC)
Lot 1	STARBOOKS Project Impact Assessment (STARBOOKS-PIA): A Baseline Evaluation Study	CRPD-CICA 2024	Php1,700,00.00
Lot 2	Conducting a Baseline Study on the Attitude of Filipinos Towards Science and Technology	STARBOOKS-CICA 2024	Php1,300,00.00
Total ABC:			Php3,000,000.00

2. The Project shall be awarded as follow:
One Project having several items grouped into several lots, which shall be awarded as separate contracts per lot.
3. The DOST-STII now calls for the submission of eligibility documents for the Procurement of Consulting Services for the DOST-STII Projects CY 2024. Eligibility documents of interested consultants must be duly received by the BAC Secretariat **on or before 25 April 2024, 10:00 a.m.** at STII Lobby, STII Bldg, DOST Complex, Gen. Santos Avenue, Bicutan, Taguig City. Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion. Late submission shall not be accepted.
4. The DOST-STII will hold a meeting for the opening of eligibility documents with the prospective bidders/interested consultants on **25 April 2024, 10:00 a.m.**
5. The BAC shall conduct meetings and conferences via face-to-face and video conferencing.
6. Interested bidders may obtain further information from DOST-STII and inspect the Bidding Documents at the address given below during office hours.

7. Part I of the Bidding Documents may be acquired by interested Bidders from **17 April 2024** at the STII – BAC Secretariat – General Services and Property Section (GSPS), 2nd Flr. STII Bldg, DOST Complex, Gen. Santos Avenue, Bicutan, Taguig City.

It may also be downloaded free of charge from the PHILGEPS website (<https://www.philgeps.gov.ph/Indexes/login>) and the website of the Procuring Entity (<http://stii.dost.gov.ph>).

8. The STII-BAC shall draw up the short list of consultants from those who have submitted Expression of Interest, including the eligibility documents, and have been determined as eligible in accordance with the provisions of Republic Act 9184 (RA 9184), otherwise known as the “Government Procurement Reform Act”, and its Implementing Rules and Regulations (IRR). The short list shall consist of at least five (5) prospective bidders who will be entitled to submit bids. The criteria and rating system for short listing are:
 - Applicable experience and capability of the firm - (50%);
 - Qualifications of the primary consultant - (30%); and
 - Current workload relative to capacity - (20%)

To qualify for shortlisting, the prospective bidder should achieve an overall minimum score of **70 points**.

9. Bidding will be conducted through open competitive bidding procedures using non-discretionary “pass/fail” criterion as specified in the IRR of RA 9184.

Bidding is restricted to Filipino citizens/sole proprietorships, cooperatives, and partnerships or organizations with at least sixty percent (60%) interest or outstanding capital stock belonging to citizens of the Philippines.

10. The Procuring Entity shall evaluate bids using the Quality-Cost Based Evaluation/Selection (QCBE/QCBS) procedure. The Procuring Entity shall indicate the weights to be allocated for the Technical and Financial Proposals. The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders.

11. The contract shall be completed as follows:

No.	Project Title	Contract Duration
Lot 1	STARBOOKS Project Impact Assessment (STARBOOKS-PIA): A Baseline Evaluation Study	12 Months
Lot 2	Conducting a Baseline Study on the Attitude of Filipinos Towards Science and Technology	8 Months

12. The DOST-STII reserves the right to reject any and all bids, declare a failure of bidding, or not award the contract at any time prior to contract award in accordance with Section 41 of RA 9184 and its IRR, without thereby incurring any liability to the affected bidder or bidders.

13. For further information, please refer to:

JONA M. BERNAL
Head BAC Secretariat
Telefax No. 837-2071 loc. 2145

(Signed)
ALAN C. TAULE
BAC Chairperson

Approved by:

(Signed)
RICHARD P. BURGOS
Director

Section II. Eligibility Documents

Notes on the Eligibility Documents

This Section provides the information necessary for prospective bidders to prepare responsive Eligibility Documents in accordance with the requirement of the Procuring Entity.

The provisions contained in this Section are to be used unchanged. Additional information or requirements specific to each procurement shall be specified in the EDS.

1. Eligibility Criteria

- 1.1. The following persons/entities shall be allowed to participate in the bidding for Consulting Services:
 - (a) Duly licensed Filipino citizens/sole proprietorships;
 - (b) Partnerships duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the interest belongs to citizens of the Philippines;
 - (c) Corporations duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the outstanding capital stock belongs to citizens of the Philippines;
 - (d) Cooperatives duly organized under the laws of the Philippines; or
 - (e) Persons/entities forming themselves into a joint venture, *i.e.*, a group of two (2) or more persons/entities that intend to be jointly and severally responsible or liable for a particular contract: Provided, however, That Filipino ownership or interest thereof shall be at least sixty percent (60%). For this purpose, Filipino ownership or interest shall be based on the contributions of each of the members of the joint venture as specified in their JVA.
- 1.2. When the types and fields of Consulting Services involve the practice of professions regulated by law, those who will actually perform the services shall be Filipino citizens and registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions specified in the **EDS**.
- 1.3. If the Request for Expression of Interest allows participation of foreign consultants, prospective foreign bidders may be eligible subject to the conditions stated in the **EDS**.
- 1.4. Government owned or –controlled corporations (GOCCs) may be eligible to participate only if they can establish that they (a) are legally and financially autonomous, (b) operate under commercial law, and (c) are not attached agencies of the Procuring Entity.

2. Eligibility Requirements

- 2.1. The following eligibility requirements, together with the Eligibility Documents Submission Form, shall be submitted on or before the date of the eligibility check specified in the Request for Expression of Interest and Clause 5 for purposes of determining eligibility of prospective bidders:
 - (a) Class “A” Documents –

Legal Documents

- (i) PhilGEPS Certificate of Registration and Membership in accordance with Section 8.5.2 of the IRR, except for foreign bidders participating in the procurement by a Philippine Foreign Service Office or Post, which shall submit their eligibility documents under Section 24.1 of the IRR, provided, that the winning Consultant shall register with PhilGEPS in accordance with Section 37.1.4 of the IRR;

Technical Documents

- (ii) Statement of the prospective bidder of all its ongoing and completed government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid, within the relevant period provided in the **EDS**. The statement shall include, for each contract, the following:
 - (ii.1) the name and location of the contract;
 - (ii.2) date of award of the contract;
 - (ii.3) type and brief description of consulting services;
 - (ii.4) consultant's role (whether main consultant, subconsultant, or partner in a JV)
 - (ii.5) amount of contract;
 - (ii.6) contract duration; and
 - (ii.7) certificate of satisfactory completion or equivalent document specified in the **EDS** issued by the client, in the case of a completed contract;
- (iii) Statement of the consultant specifying its nationality and confirming that those who will actually perform the service are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions in accordance with Clause 1.2, including their respective curriculum vitae.

- (b) Class "B" Document –

If applicable, the Joint Venture Agreement (JVA) in case the joint venture is already in existence, or duly notarized statements from all the potential joint venture partners in accordance with Section 24.1(b) of the IRR of RA 9184.

- 2.2. The eligibility requirements or statements, the bids, and all other documents to be submitted to the BAC must be in English. If the eligibility requirements or statements, the bids, and all other documents submitted to the BAC are in foreign language other than English, it must be accompanied by a translation

of the documents in English. The documents shall be translated by the relevant foreign government agency, the foreign government agency authorized to translate documents, or a registered translator in the foreign bidder's country; and shall be authenticated by the appropriate Philippine foreign service establishment/post or the equivalent office having jurisdiction over the foreign bidder's affairs in the Philippines. The English translation shall govern, for purposes of interpretation of the bid.

- 2.3. Prospective bidders may obtain a full range of expertise by associating with individual consultant(s) and/or other consultants or entities through a JV or subcontracting arrangements, as appropriate. However, subconsultants may only participate in the bid of one short listed consultant. Foreign Consultants shall seek the participation of Filipino Consultants by entering into a JV with, or subcontracting part of the project to, Filipino Consultants.

3. Format and Signing of Eligibility Documents

- 3.1. Prospective bidders shall submit their eligibility documents through their duly authorized representative on or before the deadline specified in Clause 5.
- 3.2. Prospective bidders shall prepare an original and copies of the eligibility documents. In the event of any discrepancy between the original and the copies, the original shall prevail.
- 3.3. The Eligibility Documents Submission Form shall be signed by the duly authorized representative/s of the Bidder. Failure to do so shall be a ground for the rejection of the eligibility documents.
- 3.4. Any interlineations, erasures, or overwriting shall be valid only if they are signed or initialed by the duly authorized representative/s of the prospective bidder.

4. Sealing and Marking of Eligibility Documents

- 4.1. Prospective bidders shall enclose their original eligibility documents described in Clause 2.1, in a sealed envelope marked "ORIGINAL – ELIGIBILITY DOCUMENTS". Each copy thereof shall be similarly sealed duly marking the envelopes as "COPY NO. ___ - ELIGIBILITY DOCUMENTS". These envelopes containing the original and the copies shall then be enclosed in one single envelope.
- 4.2. The original and the number of copies of the eligibility documents as indicated in the **EDS** shall be typed or written in ink and shall be signed by the prospective bidder or its duly authorized representative/s.
- 4.3. All envelopes shall:
 - (c) contain the name of the contract to be bid in capital letters;
 - (d) bear the name and address of the prospective bidder in capital letters;

- (e) be addressed to the Procuring Entity's BAC specified in the **EDS**;
 - (f) bear the specific identification of this Project indicated in the **EDS**; and
 - (g) bear a warning "DO NOT OPEN BEFORE..." the date and time for the opening of eligibility documents, in accordance with Clause 5.
- 4.4 Eligibility documents that are not properly sealed and marked, as required in the bidding documents, shall not be rejected, but the bidder or its duly authorized representative shall acknowledge such condition of the documents as submitted. The BAC shall assume no responsibility for the misplacement of the contents of the improperly sealed or marked eligibility documents, or for its premature opening.

5. Deadline for Submission of Eligibility Documents

Eligibility documents must be received by the Procuring Entity's BAC at the address and on or before the date and time indicated in the Request for Expression of Interest and the **EDS**.

6. Late Submission of Eligibility Documents

Any eligibility documents submitted after the deadline for submission and receipt prescribed in Clause 5 shall be declared "Late" and shall not be accepted by the Procuring Entity. The BAC shall record in the minutes of submission and opening of eligibility documents, the Bidder's name, its representative and the time the eligibility documents were submitted late.

7. Modification and Withdrawal of Eligibility Documents

- 7.1. The prospective bidder may modify its eligibility documents after it has been submitted; provided that the modification is received by the Procuring Entity prior to the deadline specified in Clause 5. The prospective bidder shall not be allowed to retrieve its original eligibility documents, but shall be allowed to submit another set equally sealed, properly identified, linked to its original bid marked as "ELIGIBILITY MODIFICATION" and stamped "received" by the BAC. Modifications received after the applicable deadline shall not be considered and shall be returned to the prospective bidder unopened.
- 7.2. A prospective bidder may, through a letter of withdrawal, withdraw its eligibility documents after it has been submitted, for valid and justifiable reason; provided that the letter of withdrawal is received by the Procuring Entity prior to the deadline prescribed for submission and receipt of eligibility documents.
- 7.3. Eligibility documents requested to be withdrawn in accordance with this Clause shall be returned unopened to the prospective bidder concerned. A prospective bidder that withdraws its eligibility documents shall not be permitted to submit another set, directly or indirectly, for the same project. A prospective bidder that acquired the eligibility documents may also express its intention not to participate in the bidding through a letter which should reach

and be stamped by the BAC before the deadline for submission and receipt of eligibility documents.

8. Opening and Preliminary Examination of Eligibility Documents

- 8.1. The BAC will open the envelopes containing the eligibility documents in the presence of the prospective bidders' representatives who choose to attend, at the time, on the date, and at the place specified in the **EDS**. The prospective bidders' representatives who are present shall sign a register evidencing their attendance.

In case the submitted eligibility envelopes cannot be opened as scheduled due to justifiable reasons, the BAC shall take custody of the said envelopes and reschedule the opening on the next working day or at the soonest possible time through the issuance of a Notice of Postponement to be posted in the PhilGEPS website and the website of the Procuring Entity concerned.

- 8.2. Letters of withdrawal shall be read out and recorded during the opening of eligibility documents and the envelope containing the corresponding withdrawn eligibility documents shall be returned unopened to the withdrawing prospective bidder.

- 8.3. The eligibility documents envelopes and modifications, if any, shall be opened one at a time, and the following read out and recorded:

- (h) the name of the prospective bidder;
- (i) whether there is a modification or substitution; and
- (j) the presence or absence of each document comprising the eligibility documents vis-à-vis a checklist of the required documents.

- 8.4. The eligibility of each prospective bidder shall be determined by examining each bidder's eligibility requirements or statements against a checklist of requirements, using non-discretionary "pass/fail" criterion, as stated in the Request for Expression of Interest, and shall be determined as either "eligible" or "ineligible." If a prospective bidder submits the specific eligibility document required, he shall be rated "passed" for that particular requirement. In this regard, failure to submit a requirement, or an incomplete or patently insufficient submission, shall be considered "failed" for the particular eligibility requirement concerned. If a prospective bidder is rated "passed" for all the eligibility requirements, he shall be considered eligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as "eligible." If a prospective bidder is rated "failed" in any of the eligibility requirements, he shall be considered ineligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as "ineligible." In either case, the BAC chairperson or his duly designated authority shall countersign the markings.

9. Short Listing of Consultants

- 9.1. Only prospective bidders whose submitted contracts are similar in nature and complexity to the contract to be bid as provided in the **EDS** shall be considered for short listing.
- 9.2. The BAC shall draw up the short list of prospective bidders from those declared eligible using the detailed set of criteria and rating system to be used specified in the **EDS**.
- 9.3. Shortlisted consultants shall be invited to participate in the bidding for this project through a Notice of Eligibility and Short Listing issued by the BAC.

10. Protest Mechanism

Decision of the Procuring Entity at any stage of the procurement process may be questioned in accordance with Section 55 of the IRR of RA 9184.

Section III. Eligibility Data Sheet

Notes on the Eligibility Data Sheet

This Section is intended to assist the Procuring Entity in providing the specific information and requirements in relation to corresponding clauses in the Eligibility Documents, and has to be prepared for each specific procurement.

The Procuring Entity should specify in this Section the information and requirements specific to the circumstances of the Procuring Entity, the processing of the eligibility, and the rules that will apply in the determination and evaluation of eligibility.

In preparing this Section, the following aspects should be checked:

- (a) Information that specifies and complements provisions of the Eligibility Documents must be incorporated.
- (b) Amendments and/or supplements, if any, to provisions of the Eligibility Documents as necessitated by the circumstances of the specific procurement, must also be incorporated.

Eligibility Data Sheet

Eligibility Documents	
1.2	<p><i>Lot 1: STARBOOKS Project Impact Assessment (STARBOOKS-PIA): A Baseline Evaluation Study</i></p> <p><i>Lot 2: Conducting a Baseline Study on the Attitude of Filipinos Towards Science and Technology</i></p>
1.3	No further instructions
2.1(a)(i)	PhilGEPS Certificate of Registration and Membership (Platinum) in accordance with Section 8.5.2 of the IRR.
2.1(a)(ii)	The statement of all ongoing and completed government and private contracts shall include all such contracts within 5 years prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	Certificate/s of satisfactory completion or equivalent document specified issued by the client, in the case of a completed contract, and/or a certificate of satisfactory completion of similar studies conducted in the past five (5) years signed by authorized representatives of the end-user.
0	Each prospective bidder shall submit <i>one (1) original and One (1) duplicate hard copies</i> of its eligibility documents.
(e)	<p>Bids and Awards Committee DOST-Science and Technology Information Institute</p> <p>Attention: General Services and Property Section Contact No.: 09062540101/ 09239582400</p>
(f)	STII-REI-2024-014: Procurement of Consulting Services for the DOST-STII Projects for CY 2024.
0	<p>The address for submission of eligibility documents is <i>STII – BAC Secretariat – General Services and Property Section (GSPS), 2nd Flr. STII Bldg, DOST Complex, Gen. Santos Avenue, Bicutan, Taguig City.</i></p> <p>The deadline for submission of eligibility documents is <i>April 25, 2024 – 10:00 AM.</i></p>
0	<p>The place of opening of eligibility documents is <i>Training Room STII Bldg, DOST Complex, Gen. Santos Avenue, Bicutan, Taguig City.</i></p> <p>The date and time of opening of eligibility documents is <i>April 25, 2024 – 10:00 AM.</i></p>
0	Similar contracts shall refer to the <i>Project Impact Assessment: Design and</i>

	<i>Conduct of Baseline Evaluation Study.</i>
0	<p>The BAC shall draw up the short list of consultants from those who have submitted Expression of Interest, including the eligibility documents, and have been determined as eligible in accordance with the provisions of Republic Act 9184 (RA 9184), otherwise known as the “Government Procurement Reform Act”, and its Implementing Rules and Regulations (IRR). The short list shall consist of at least five (5) prospective bidders who will be entitled to submit bids. The criteria and rating system for short listing are:</p> <ul style="list-style-type: none"> • Applicable experience and capability of the firm (50%); • Qualifications of the primary consultant (30%); and • Current workload relative to capacity (20%) <p>To qualify for shortlisting, the prospective bidder should achieve an overall minimum score of 70 points.</p>

Criteria for Short Listing of Prospective Consultants

MINIMUM REQUIREMENTS	WEIGHT	RATE										
I. TECHNICAL CAPABILITY												
<p>A. Applicable Experience of the Consulting Firm</p> <p>1. Consultancy Business (30%) At least five (5) years in consultancy business (Project Assessment) 11 years and above: 100% 6-10 years: 85% 5 years: 70% Below 5 years in consultancy business: non-compliant</p> <p>2. Completed Similar Projects (20%) Completed Project Assessment projects: 4 projects and above: 100% 2-3 projects: 85% 1 project: 70% No similar project: non-compliant</p> <p>Title of Projects:</p>	50%											
<p>B. Qualification of Primary Consultant to be assigned to the Project:</p> <table border="1" style="width: 100%; margin-bottom: 10px;"> <thead> <tr> <th style="text-align: center;">Consultant</th> <th style="text-align: center;">Weight</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1. Educational Attainment</td> <td style="text-align: center;">5%</td> </tr> <tr> <td style="text-align: center;">2. Experience</td> <td style="text-align: center;">20%</td> </tr> <tr> <td style="text-align: center;">3. Training</td> <td style="text-align: center;">5%</td> </tr> <tr> <td style="text-align: center;">Total</td> <td style="text-align: center;">30%</td> </tr> </tbody> </table> <p>1. Subject Matter Expert An expert with at least five (5) years of experience. With at least three (3) similar projects:</p> <p>a. Educational Attainment: i. With Doctorate: 100% ii. With Master's Degree: 85% iii. With Bachelor's Degree: 70%</p> <p>b. Experience: i. An expert with at least five (5) years of experience Above 9 years of experience: 100% 8-9 years of experience: 90% 6-7 years of experience: 80% 5 years of experience: 70% Below 5 years of experience: non-compliant</p>	Consultant	Weight	1. Educational Attainment	5%	2. Experience	20%	3. Training	5%	Total	30%	30%	
Consultant	Weight											
1. Educational Attainment	5%											
2. Experience	20%											
3. Training	5%											
Total	30%											

<p>ii. With experience - completed at least three (3) similar projects 6 similar projects and more: 100% 5 similar projects: 90% 4 similar projects: 80% 3 projects: 70% below 3 similar project: non-compliant</p> <p>c. Training related to project assessment 5 specialized training completed: 100% 4 specialized training completed: 90% 3 specialized training completed: 80% Less than 3 specialized training completed: non-compliant</p>		
<p>C. Current Workload Relative to Capacity</p> <p>1. On-going Projects</p> <p>2 projects and below: 100% 3-4 projects: 90% 5-6 projects: 80% 7 and above projects: 70%</p>	20%	
TOTAL	100%	

Name of BAC / TWG Member : _____
Signature : _____
Date : _____

ELIGIBILITY DOCUMENTS SUBMISSION FORM

[Date]

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

In connection with your Request for Expression of Interest dated [insert date] for [Title of Project], [Name of Consultant] hereby expresses interest in participating in the eligibility and short listing for said Project and submits the attached eligibility documents in compliance with the Eligibility Documents therefor.

In line with this submission, we certify that:

- a) [Name of Consultant] is not blacklisted or barred from bidding by the GoP or any of its agencies, offices, corporations, LGUs, or autonomous regional government, including foreign government/foreign or international financing institution; and
- b) Each of the documents submitted herewith is an authentic copy of the original, complete, and all statements and information provided therein are true and correct.

We acknowledge and accept the Procuring Entity's right to inspect and audit all records relating to our submission irrespective of whether we are declared eligible and short listed or not.

We further acknowledge that failure to sign this Eligibility Document Submission Form shall be a ground for our disqualification.

Yours sincerely,

Signature
Name and Title of Authorized Signatory
Name of Consultant
Address

ELIGIBILITY CHECKLIST (SHORT LISTING)

Class “A” Documents

Legal Documents

- (a) Valid PhilGEPS Registration Certificate (Platinum Membership) (all pages);
or
 (b) Registration certificate from Securities and Exchange Commission (SEC), Department of Trade and Industry (DTI) for sole proprietorship, or Cooperative Development Authority (CDA) for cooperatives or its equivalent document,
and
 (c) Mayor’s or Business permit issued by the city or municipality where the principal place of business of the prospective bidder is located, or the equivalent document for Exclusive Economic Zones or Areas;
and
 (d) Tax clearance per E.O. No. 398, s. 2005, as finally reviewed and approved by the Bureau of Internal Revenue (BIR).

Technical Documents

- (e) Statement of the prospective bidder of all its ongoing government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid; and
 (f) Statement of the consultant specifying its nationality and confirming that those who will actually perform the service are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions in accordance with Clause 1.2, including their respective curriculum vitae; and
 (g) Bid Bulletin, if any;

Financial Documents

- (h) The Supplier’s audited financial statements, showing, among others, the Supplier’s total and current assets and liabilities, stamped “received” by the BIR or its duly accredited and authorized institutions, for the preceding calendar year which should not be earlier than two (2) years from the date of bid submission; and

Class “B” Documents

- (i) If applicable, a duly signed joint venture agreement (JVA) in case the joint venture is already in existence;
or
duly notarized statements from all the potential joint venture partners stating that they will enter into and abide by the provisions of the JVA in the instance that the bid is successful.

Note : Note: Prospective Bidders found and declared “Passed” shall be subject to evaluation, validation and shortlisting proceedings, in accordance with the implementing rules and regulations of R.A. 9184.

