

INVITATION FOR NEGOTIATED PROCUREMENT-TWO FAILED BIDDINGS NO. 2022-11-0218

*(Pursuant to Section 53.1 of the Revised Implementing Rules and Regulations of R.A 9184 –
Negotiated Procurement Two Failed Competitive Biddings)*

ENGAGEMENT OF A SURVEY FIRM FOR THE DATA COLLECTION ON THE PHILIPPINE DIGITAL CREDIT MARKET

1. In view of the two (2) failed biddings, the *Philippine Competition Commission (PCC)* invites bidders to participate in the negotiation for the *Engagement of a Survey Firm for the Data Collection on the Philippine Digital Credit Market*.
2. The *PCC*, through the *2022 General Appropriations Act* intends to apply the sum of *Two Million Pesos (PhP2,000,000.00)*, being the Approved Budget for the Contract (ABC) to payments under the contract for the abovementioned procurement.
3. The PCC now invites interested bidders to submit and negotiate offers for the project on *7 December 2022 at 2:00 P.M* through *Microsoft Teams Teleconference*.
4. 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, and to citizens or organizations of a country the laws or regulations of which grant similar rights or privileges to Filipino citizens, pursuant to RA 5183.
5. Following the completion of the negotiations, the best and final offer based on the technical and financial requirements, including the pre-requisite documentary requirements enumerated in the checklist of requirements hereof must be duly received by the PBAC Secretariat on or before *14 December 2022, 12:00 NN* at the address below or through *E-Bid Submission which may be accessed through PCC Website*. Late submissions shall not be accepted.
6. The *Philippine Competition Commission* 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 RIRR, without thereby incurring any liability to the affected bidder or bidders.

7. For further information, please refer to:

THE SECRETARIAT

Bids and Awards Committee

Philippine Competition Commission

25F Tower 1, Vertis North Corporate Center,

North Avenue, Quezon City

Telephone No.: (02) 8771-9722 local 204

e-mail: procurement@phcc.gov.ph or amfrancisco@phcc.gov.ph

28 November 2022



ATTY. JOSEPH MELVIN B. BASAS 
Chairperson, PCC Bids and Awards Committee

TERMS OF REFERENCE

Engagement of a Survey Firm for the Data Collection on the Philippine Digital Credit Market

1. Background

Digital credit offers significant potential to advance financial inclusion by allowing previously unbanked and underbanked consumers access credit. The speed and ease of access to digital credit, however, has raised several competition and consumer protection concerns. In the Philippines, there has been significant growth in digital lending offerings in the last five years. Yet, there is no available official data that documents the extent of digital credit usage in the country. As the Philippines' antitrust authority, the Philippine Competition Commission (PCC) promotes fair market competition to help achieve a vibrant and inclusive economy and to advance consumer welfare. The PCC conducts research activities that help the Commission better understand market dynamics, especially in emerging businesses such as digital credit. This engagement aims to provide answers to the following questions:

- 1) What is the extent of digital credit usage in the Philippines and who are using it?
- 2) What are the motivations of Filipinos for using digital credit?
- 3) How do digital credit products compare with the wider unsecured consumer credit market in the Philippines (cost, tenure, terms and conditions)? Are any digital lending products strictly dominated in financial terms?
- 4) To what extent does horizontal (across digital lenders) and vertical (across the unsecured credit market) competition exist? Is competition delivering for consumers?

The project requires the services of a survey firm to conduct a nationally representative consumer survey, with an oversample of digital credit users. The details of the survey are summarized as follows:

Type of survey	Nationally representative consumer survey
Target Population	Filipinos, 18-64 years old
Survey area	National (NCR, Balance Luzon, Visayas, Mindanao)
Sample size	3,000 respondents (at least 500 respondents with experience in using digital credit)
Duration of the project	90 calendar days
Approved Budget for the Contract (ABC)	PhP 2,000,000.00

2. OBJECTIVE

The survey aims to gather the following information, among others, from the respondents: socio-demographic characteristics, financial lives, motivation, usage, experience with digital credit, and impact of behaviorally-informed disclosures and nudges on loan choice. The survey should cover major island groups in the Philippines (National Capital Region, Balance Luzon, Visayas, Mindanao).

3. SCOPE OF WORK

A. Tasks

The survey firm shall carry out the following tasks:

Pre-survey Activities

1. *Provide details on data quality processes*

- a. Provide write-up on how the survey panel is constructed and how the respondents are recruited; and
- b. Provide write-up on data quality checks such as but not limited to validity of survey response, legitimacy and uniqueness of respondent, process of substitution in case of non-response, and handling of bad responses.

Deliverables

Details mentioned above must be included in the firm's financial proposal.

2. *Revise, test, and finalize the survey instrument*

- a. Review of draft survey and choice experiment questionnaires provided by PCC;
- b. Program the draft survey and choice experiment questionnaires into a survey instrument;
- c. Pre-test the survey instrument on 10 respondents distributed across different age groups, and provide updates to PCC for any possible revision based on actual feedback from pre-test respondents; and
- d. Finalize the survey instrument in coordination with PCC staff.

Deliverables

1. Survey instrument for pilot testing on 10 respondents, distributed (i) across different age groups, and (ii) by experience in the use of digital credit;
2. Electronic files (in Excel) of encoded pre-test dataset and data dictionary;
3. Final survey instrument in English and Filipino; and
4. Final work plan schedule from pilot testing to submission of all deliverables.

Data Collection, Processing and Reports

3. *Deploy survey*

- a. Prepare the necessary materials for the survey;
- b. Inform PCC of the schedule of survey and give relevant updates; and
- c. The survey firm should be able to achieve 3,000 completed survey, of which at least 500 have used digital credit in the last 12 months. The qualified respondents are Filipinos who are 18-64 years of age.

Deliverables

Report on the status of the survey, including difficulties encountered and possible deviations from the original plan.

4. *Encode and clean data, and deliver clean dataset*

- a. Encode the collected data;
- b. Clean and validate data files; and
- c. Submit clean dataset.

Deliverables

1. Protocol for data entry and quality control measures;
2. Detailed report on data quality issues and difficulties encountered during data collection stage, and how they were handled;

3. Electronic files (in Excel) of the clean survey dataset and data dictionary.

Post-survey Activities

5. *Deliver reports and maintain coordination with PCC staff*

- a. Deliver reports and other materials used in the survey; and
- b. Respond to inquiries from PCC on survey implementation, and data encoding and management within 30 calendar days after the delivery of the complete set of electronic files of datasets and data dictionary.

Deliverables

1. Narrative report to the PCC on the outcome of the survey including issues encountered throughout the project;
2. Electronic copy (in .pdf, .doc or .xlsx as applicable) of documents and other materials used in the survey; and
3. Written response to the PCC's inquiries, as needed.

B. Survey mode and length

Survey for 3,000 respondents will be done, of which at least 500 respondents should have used digital credit in the last 12 months. Each survey is expected to last for 20-25 minutes.

C. Target respondents, sample size, sampling method

The target respondents of the survey will be Filipinos, 18-64 years old. The survey should be nationally representative covering the major island groups (NCR, Balance Luzon, Visayas and Mindanao). At least 3,000 completed surveys are required, of which at least 500 have used digital credit in the last 12 months.

4. SERVICES TO BE PROVIDED BY THE PCC

1. Provide the survey firm a directive to facilitate the execution of the survey;
2. Provide the survey firm with the draft survey and choice experiment questionnaires;
3. Constantly coordinate with the survey firm on the planning and implementation of the survey to be conducted;
4. Provide comments on the sampling design proposed by the survey firm; and
5. Pay the project cost inclusive of mandatory taxes and in accordance with the set payment schedule.

The survey firm shall be engaged by the PCC and shall submit outputs directly to the designated project manager within PCC for review and endorsement for payment.

5. APPROVED BUDGET FOR THE CONTRACT

The Approved Budget for the Contract (ABC) is **Two Million Pesos (PhP2,000,000.00)**, inclusive of all applicable government taxes, and shall include all remunerations, costs or profits arising from or in relation to the services rendered in connection with and/or in preparation for this engagement, such as, among others, survey preparation to the actual conduct of the survey and delivery of post-survey documents and reports.

The mode of procurement shall be Public Bidding as provided under the Revised Implementing Rules and Regulations (IRR) of Republic Act (R.A.) No. 9184.

6. TIMELINES, DELIVERABLES, AND SCHEDULE AND MODE OF PAYMENT

The service provider shall be engaged for 90 calendar days immediately after the winning bidder's conformed receipt of Notice to Proceed – including 30 calendar days for preparation and pre-survey activities, 30 calendar days for actual survey, data collection, and processing and encoding, and 30 calendar days for post-survey

activities and delivery of electronic files of datasets. The service provider shall provide its proposed implementation schedule indicating the specific activities and corresponding outputs using a Gantt chart. Reports and other relevant documents are to be submitted to and should be duly received by the PCC project manager. Below is the summary of the deadline of submissions for each deliverable:

MILESTONES	DELIVERABLES	% of contract amount
Issuance of Notice to Proceed, and Conformed Receipt thereof of the Service Provider (Day 1)	Duly signed Financial Proposal to cover the cost of the project. Aside from budget, the financial proposal should also include details on data quality processes as outlined in section 3.1 of this document.	10%
<p>Pre-survey activities</p> <p>Revise, test, and finalize the survey instrument</p>	<p>Printed and electronic copy of original signed documents duly received and accepted/approved by the PCC, as follows:</p> <ul style="list-style-type: none"> • Survey instrument for pilot testing • Electronic files (in Excel) of datasets and report from the pilot testing • Final survey instrument in English and in Filipino • Final work plan schedule from pilot testing to deployment of actual survey <p>Submission date: Within 30 calendar days from Conformed Receipt of the Notice to Proceed of the Service Provider</p>	20%
<p>Data Collection and Processing</p> <p>1. Deploy survey</p> <p>2. Encode and clean data, and deliver clean dataset</p>	<p>Printed and electronic copy of original signed documents duly received and accepted/approved by the PCC, as follows:</p> <ul style="list-style-type: none"> • Report on the status of the survey including difficulties encountered and possible deviations from the original plan. • Protocol for data entry and quality control measures. • Detailed report on data quality issues and difficulties encountered during data collection stage, and how they were handled; • Electronic files (in Excel) of clean survey datasets and data dictionary. • Electronic copy of basic descriptive statistics of the survey results <p>Submission date: Within 30 calendar days from the acceptance/approval of deliverables for pre-survey activities</p>	30%
<p>Post-survey Activities</p> <p>Deliver reports and maintain coordination with PCC staff</p>	<p>Printed and electronic copy of original signed documents duly received and accepted/approved by the PCC, as follows:</p> <ul style="list-style-type: none"> • Narrative report to the PCC on the outcome of the survey including issues encountered throughout the project. • Original signed transmittal of the electronic form (in .pdf, .doc or .xlsx as applicable) of documents and other materials used in the survey. • Written response to the PCC’s inquiries as needed. <p>Submission date: Within 30 calendar days from the PCC’s acceptance of the deliverables for data collection and processing</p>	40%
TOTAL	Completion of engagement within 90 calendar days from the winning bidder’s conformed receipt of Notice to Proceed	100%

The timeline for the survey shall begin when the survey firm is notified by the PCC through a task order to be sent through an email or formal letter; while counting of the number of days elapsed shall begin strictly from the date of Contract Signing.

All printed documents to be submitted to the PCC should be properly and duly signed by the Project Manager or the highest officer/personnel in-charge of the project.

All payments shall be endorsed by the Director of the Economics Office supported by the original signed statement of account or billing statement, the issuance of a Certificate of Satisfactory Service Rendered for the deliverables for each tranche payment, and each tranche payment to the service provider shall be released upon PCC's review and acceptance of the deliverables above.

7. QUALIFICATIONS OF THE CONTRACTOR AND ITS PERSONNEL

The service provider should meet all the requirements set by the Government Procurement Reform Act (R.A. No. 9184) to be eligible to participate in the procurement.

Criteria	Minimum Qualifications	Bases	Weight (%)
Experience and Capability of the bidder	<ul style="list-style-type: none"> At least five years in business. Engaged with at least 5 (five) companies/institutions in similar or relevant nature of work (i.e., preparation of survey instruments and sampling designs, provision of trainings for enumerators, data encoders, etc., conduct of survey, collection and analysis of data, and reporting of survey results) Engaged with at least two (2) institutions belonging to the public/government sector in similar or relevant nature of work as mentioned above 	<p>Records of previous engagement and quality of performance in projects related to competition and other similar fields, and geographical distribution of current/impending projects.</p> <p>(a) DTI or SEC registration submitted indicating the year of registration and/or other relevant documents; (b) list of completed and on-going contracts; (c) copies of Certificates of Satisfactory Service Rendered / Certificates of Completion</p>	40%
Quality of personnel to be assigned to the project	<p><u>Project Manager</u></p> <ul style="list-style-type: none"> Graduate of any degree in social sciences and research At least seven (7) years of experience with survey design and implementation At least 24 hours of relevant training <p><u>Statistical Service Executive</u></p> <ul style="list-style-type: none"> Graduate of B.S. Statistics At least five (5) years of experience in statistical techniques and sampling design At least 24 hours of relevant training <p><u>Electronic Data Processing Manager</u></p> <ul style="list-style-type: none"> Graduate of any four (4)-year degree course Two (2) years of experience in designing a system to input and manage data and good command of Stata or R; 	<p>Original signed curriculum vitae submitted indicating relevant work experience and educational background, and trainings attended supported by certificates of attendance / participation</p> <p><i>Note: Pursuant to Section 33.3 of the revised IRR, there should be no replacement of key personnel before the awarding of the contract, except for justifiable reason, such as illness, death, or resignation provided it is duly supported by relevant certificates, or any delay caused by the procuring entity. Once the contract has been awarded, no replacement shall be allowed until after fifty percent (50%) of the personnel's man-months have been served, except for justifiable reasons, subject to appropriate sanctions as prescribed in the Philippine Bidding Documents (PBD).</i></p>	40%

Criteria	Minimum Qualifications	Bases	Weight (%)
	<ul style="list-style-type: none"> With at least 24 hours of relevant training <p><u>Tabulation Manager</u></p> <ul style="list-style-type: none"> Graduate of any four (4)-year degree course Two (2) years of experience in designing a system to input and manage data and good command of Stata or R; With at least 24 hours of relevant training <p><u>Field Manager</u></p> <ul style="list-style-type: none"> Graduate of any four (4)-year degree course Two (2) years of experience in managing the conduct of surveys; With at least 24 hours of relevant training 		
Overall work commitment	At most 5 ongoing projects (including awarded but not yet started contracts)	Originally signed records of on-going (including awarded but not yet started contracts) and previous engagements <i>Note: Contract/s that will terminate on or before 90 calendar days, from the deadline of submission of eligibility documents for this project, shall not be considered as 'ongoing'.</i>	20%

8. CRITERIA FOR EVALUATION

The technical and financial proposals will be evaluated using the Quality-Cost-Based Evaluation (QCBE).

Criteria	Bases	Weight (%)
Technical Proposal		
Quality of personnel to be assigned to the project (30%)	As specified in the qualifications above, and the submission of a duly notarized Omnibus Sworn Statement using the prescribed format of R.A. No. 9184	60%
Experience and capability of the service provider (20%)		
Plan of approach and methodology (50%)	Timeliness, clarity, feasibility of the written proposal, and overall quality of proposed work	
Financial Proposal		40%
TOTAL		100%

The bidder with the highest rated score based on the technical and financial proposals submitted, provided that the score passes the hurdle rate of 80 points, shall be the Highest Rated Bidder.

9. CONFIDENTIALITY OF DATA AND INFORMATION

The Consultant shall be engaged by the PCC and shall submit outputs directly to the designated project manager within PCC for review and endorsement for payment.

To ensure protection of PCC assets, service providers are expected to observe and abide by the established PCC Information Security Management System (PCC ISMS) and shall agree to sign a non-disclosure

agreement. All data, documents, records, backup files and Virtual Machine (VM) configuration files and metadata (collectively “Information”) to be provided to the Service Providers for purposes of delivering the Services are considered confidential information and shall remain the sole property of PCC. The Service Providers shall acknowledge the importance of maintaining security and confidentiality of the Information and agree to prevent unauthorized transfer, disclosure, or use of these Information by any third person or entity. Service Providers shall not use the Information for any purpose other than in connection with the Services. Service Providers shall ensure that it will not retain, after completion of the Services with which the Information was provided, all or any portion of the Information, in any manner whatsoever. Upon completion of the Services, all Information shall be deleted by PCC. The Service Provider shall not keep any copy of the Information in either digital or physical format, including, but not limited to notes, documents, memoranda, and other writing, electronic records, communications, and the like.

10. LIQUIDATED DAMAGES

If the contractor fails to deliver any or all of the goods and/or to perform the services within the period specified in this contract, the Procuring Entity shall, without prejudice to its other remedies under this contract and under the applicable law, deduct from the contract price as liquidated damages, the applicable rate of one-tenth (1/10) of one percent (1%) of the cost of unperformed portion of every day of delay. The maximum deduction shall be ten percent (10%) of the amount of the contract. Once the maximum is reached, the procuring entity reserves the right to rescind the contract, without prejudice to other courses of action and remedies open to it.


11. DISPUTE RESOLUTION

Should any dispute related to the TOR and/or rights of the parties arise, the same shall be submitted to mutual consultation, mediation and arbitration, in the order of application. The venue of the proceedings shall be in Quezon City.

In case of a court suit, the venue shall be the courts of competent jurisdiction in Quezon City, to the exclusion of all other courts; and

Any amendment or additional terms and conditions to the TOR must be in writing, signed and acknowledged by the Parties.

Approved by:


BENJAMIN E. RADO, JR., PhD
Director IV, Economics Office

CONFORME:

Name and Signature of Authorized Representative

Designation

Name of Company

Date

***Checklist of Requirements for Consulting Services
(Negotiated Procurement- Two Failed Biddings)***

***“Engagement of a Survey Firm for the Data Collection on the Philippine
Digital Credit Market”***

1. Eligibility documents Submission Form (Annex A)

A. Eligibility Documents:

2. Valid PhilGEPS Registration Certificate (Platinum Membership) (all pages) in accordance **with Section 8.5.2 of the IRR**

Class “A” Documents

Legal Documents

3. Valid PhilGEPS Registration Certificate (Platinum Membership)

Technical Documents

4. Statement of Completed Contracts (Annex D)
 5. Certificate of Good Standing and Satisfactory Completion
 6. Statement of Ongoing and Awarded but Not Yet Started Contracts (Annex E)
 7. Statement of Consultant’s Nationality (Annex B)
 8. Curriculum Vitae for the Proposed Professional Staff (Annex C)
- Additional: Secretary’s Certificate for Authorized Signatory (Notarized)

Financial Documents

9. Audited Financial Statements (AFS) for the year 2020

Class “B” Document

Legal Documents

10. Valid Joint Venture Agreement (JVA) if JV is 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.

B. Technical Proposal:

TPF 1. Technical Proposal Submission Form

TPF 2. Consultant’s References

TPF 3. Comments and Suggestions of Consultant on the Terms of Reference and on Data, Services, and Facilities to be Provided by the Procuring Entity

TPF 4. Description of the Methodology and Work Plan for Performing the Project

TPF 5. Team Composition and Task

TPF 6. Format of Curriculum Vitae (CV) for Proposed Professional Staff

TPF 7. Time Schedule for Professional Personnel

TPF 8. Activity (Work) Schedule

Omnibus Sworn Statement

Bid-Securing Declaration

C. Financial Proposal:

FPF 1. Financial Proposal Submission Form

FPF 2. Summary of Costs

FPF 3. Breakdown of Price per Activity

FPF 4. Breakdown of Remuneration per Activity

FPF 5. Reimbursables per Activity

FPF 6. Miscellaneous Expenses

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]* under *[Reference No.]*, *[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, or LGUs, including foreign government/foreign or international financing institution whose blacklisting rules have been recognized by the Government Procurement Policy Board, and that each of the documents submit; 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.

Yours sincerely,
Signature
Name and Title of Authorized Signatory
Name of Consultant
Address

ANNEX B

STATEMENT OF THE CONSULTANT'S NATIONALITY

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

In compliance with the requirements of the **Philippine Competition Commission**, for the **[Project Title]** under **[Reference No.]**, I/We hereby declare the following:

1. [Select one and delete the rest]

[If domestic entity bidder] That (Name of Bidder) is a domestic *sole proprietorship/partnership/corporation/joint venture* organized or formed under the laws of the Philippines;

[If foreign entity bidder] That (Name of Bidder) is a foreign *sole proprietorship/partnership/corporation/joint venture* organized or formed under the laws of the (Name of Country);

[If foreign entity bidder] That (Name of Bidder) is registered with the Securities and Exchange Commission and/or any agency authorized by the laws of the Philippines;

2. That the following are/is the proposed Consultants:

Name of Proposed Consultant	Proposed Position	Nationality	Proof of Identification
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			

3. That attached herewith are the Curriculum Vitae of the abovementioned personnel (*Annex/es* _____); and
4. That the undersigned is/are the authorized representative/s for this public bidding as evidenced by herewith attached notarized authority.

Very truly yours,

Signature: _____

Name and Title of Authorized Signatory: _____

Name of Consultant/Company: _____

Address: _____

Contact Nos: _____

ANNEX C

FORMAT OF CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF

Proposed Position					
Personal Information					
Name of Staff					
Address			Contact No.		Email Address
Date of Birth		Citizenship		Civil Status	
Work Experience <i>(start from the current employment, add rows if necessary)</i>					
AGENCY / COMPANY NAME (Write in full)	INCLUSIVE DATES (mm/dd/yy)		Total Number of Experience (Number of Years and Months)	POSITION TITLE (Write in full)	JOB DESCRIPTION
	From	To			
Relevant Training <i>(start from the most recent, add rows if necessary)</i>					
Course Title	Inclusive Dates		Location	No. of Hours	Conducted / Sponsored by
	From	To			
Education <i>(start from the most recent, add rows if necessary)</i>					
School	Inclusive Dates		Degree Course	Scholarships / Academic Honors Received	
	From	To			

Technical Expertise	
Database	
Operating Systems	
Application Software	
Professional Licenses, Certificates, Other Credentials	
Title	Date Received

Certification:

I, the undersigned, certify that to the best of my knowledge and belief, these data correctly describe me, my qualifications, and my experience.

_____ Date: _____
[Signature of staff member and authorized representative of the firm] *Day/Month/Year*

Full name of staff member: _____

Full name of authorized representative: _____

STATEMENT OF COMPLETED GOVERNMENT AND PRIVATE CONTRACTS

This is to certify that _____ (consultant) _____ has the following completed contracts:

PROJECT NAME (including NAME, ADDRESS OF CLIENT, CONTACT NO.)	DATE OF CONTRACT	TYPE OF CONTRACT	START DATE	COMPLETION DATE	AMOUNT OF CONTRACT	CONSULTANT'S ROLE (DESCRIPTION OF ACTUAL SERVICES PROVIDED)

Name and Signature of Authorized Representative

Date

STATEMENT OF ONGOING GOVERNMENT AND PRIVATE CONTRACTS AND AWARDED BUT NOT YET STARTED CONTRACTS

This is to certify that _____ (consultant) _____ has the following ongoing and awarded but not yet started contracts:

DATE OF CONTRACT	CONTRACTING PARTY	NAME OF CONTRACT	TYPE OF CONTRACT	BRIEF DESCRIPTION OF CONSULTING SERVICE	AMOUNT OF CONTRACT	VALUE OF OUTSTANDING CONTRACT	CONSULTANT IS: a. main consultant b. subcontractor c. partner in a JV

Name and Signature of Authorized Representative

Date

TPF 1. TECHNICAL PROPOSAL SUBMISSION FORM

[Date]

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for *[Title of Project]* in accordance with your Bidding Documents dated *[insert date]* and our Bid. We are hereby submitting our Bid, which includes this Technical Proposal, and a Financial Proposal sealed under a separate envelope.

In accordance with **ITB** Clause 21.1, we confirm that the information contained in the eligibility documents submitted earlier together with the Expression of Interest remain correct as of the date of bid submission.

If negotiations are held during the period of bid validity, *i.e.*, before *[insert date]*, we undertake to negotiate on the basis of the proposed staff. Our Bid is binding upon us and subject to the modifications resulting from contract negotiations.

In accordance with **GCC** Clause 51, we acknowledge and accept the Procuring Entity's right to inspect and audit all records relating to our Bid irrespective of whether we enter into a contract with the Procuring Entity as a result of this Bid or not.

We understand you are not bound to accept any Bid received for the selection of a consultant for the Project.

We acknowledge that failure to sign this Technical Proposal Submission Form and the abovementioned Financial Proposal Submission Form shall be a ground for the rejection of our Bid.

We remain,

Yours sincerely,

Authorized Signature:

Name and Title of Signatory:

Name of Firm:

Address:

TPF 2. CONSULTANT'S REFERENCES

Relevant Services Carried Out in the Last Five Years That Best Illustrate Qualifications

Using the format below, provide information on each project for which your firm/entity, either individually, as a corporate entity, or as one of the major companies within an association, was legally contracted.

Project Name:		Country:
Location within Country:		Professional Staff Provided by Your Firm/Entity(profiles):
Name of Client:		Nº of Staff:
Address:		Nº of Staff-Months; Duration of Project:
Start Date (Month/Year):	Completion Date (Month/Year):	Approx. Value of Services (in Current US\$):
Name of Associated Consultants, if any:		Nº of Months of Professional Staff Provided by Associated Consultants:
Name of Senior Staff (Project Director/Coordinator, Team Leader) Involved and Functions Performed:		
Narrative Description of Project:		
Description of Actual Services Provided by Your Staff:		

Consultant's Name: _____

TPF 3. COMMENTS AND SUGGESTIONS OF CONSULTANT ON THE TERMS OF REFERENCE AND ON DATA, SERVICES, AND FACILITIES TO BE PROVIDED BY THE PROCURING ENTITY

On the Terms of Reference:

- 1.
- 2.
- 3.
- 4.
- 5.

On the data, services, and facilities to be provided by the Procuring Entity:

- 1.
- 2.
- 3.
- 4.
- 5.

**TPF 4. DESCRIPTION OF THE METHODOLOGY AND WORK PLAN FOR
PERFORMING THE PROJECT**

TPF 5. TEAM COMPOSITION AND TASK

1. Technical/Managerial Staff		
Name	Position	Task

2. Support Staff		
Name	Position	Task

3 Where applicable, indicate relationships among the Consultant and any partner and/or subconsultant, the Procuring Entity, the Funding Source and other parties or stakeholders.

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TPF 6. FORMAT OF CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF

Proposed Position: _____

Name of Firm: _____

Name of Staff: _____

Profession: _____

Date of Birth: _____

Years with Firm/Entity: _____ Nationality: _____

Membership in Professional Societies: _____

Detailed Tasks Assigned: _____

Key Qualifications:

[Give an outline of staff member's experience and training most pertinent to tasks on project. Describe degree of responsibility held by staff member on relevant previous projects and give dates and locations. Use about half a page.]

Education:

[Summarize college/university and other specialized education of staff members, giving names of schools, dates attended, and degrees obtained. Use about one quarter of a page.]

Employment Record:

[Starting with present position, list in reverse order every employment held. List all positions held by staff member since graduation, giving dates, names of employing organizations, titles of positions held, and locations of projects. For experience in last ten years, also give types of activities performed and client references, where appropriate. Use about two pages.]

Languages:

[For each language, indicate proficiency: excellent, good, fair, or poor in speaking, reading, and writing.]

Certification:

I, the undersigned, certify that to the best of my knowledge and belief, these data correctly describe me, my qualifications, and my experience.

Commitment:

I also commit to work for the Project in accordance with the time schedule as indicated in the contract once the firm is awarded the Project.

_____ Date: _____
[Signature of staff member and authorized representative of the firm] *Day/Month/Year*

Full name of staff member: _____

Full name of authorized representative: _____

SUBSCRIBED AND SWORN to before me this ___ day of *[month]* *[year]* at *[place of execution]*, Philippines. Affiant/s is/are personally known to me and was/were identified by me through competent evidence of identity as defined in the 2004 Rules on Notarial Practice (A.M. No. 02-8-13-SC). Affiant/s exhibited to me his/her *[insert type of government identification card used]*, with his/her photograph and signature appearing thereon, with no. _____.

Witness my hand and seal this ___ day of *[month]* *[year]*.

NAME OF NOTARY PUBLIC

Serial No. of Commission _____
Notary Public for _____ **until** _____
Roll of Attorneys No. _____
PTR No. __, *[date issued]*, *[place issued]*
IBP No. __, *[date issued]*, *[place issued]*
Doc. No. ____
Page No. ____
Book No. ____
Series of ____.

TPF 8. ACTIVITY (WORK) SCHEDULE

A. Field Investigation and Study Items

	<i>[1st, 2nd, etc. are months from the start of project.]</i>											
	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th
Activity (Work)												

B. Completion and Submission of Reports

Reports	Date
1. Inception Report	
2. Interim Progress Report (a) First Status Report (b) Second Status Report	
3. Draft Report	
4. Final Report	

Omnibus Sworn Statement

REPUBLIC OF THE PHILIPPINES)
 CITY/MUNICIPALITY OF _____) S.S.

AFFIDAVIT

I, *[Name of Affiant]*, of legal age, *[Civil Status]*, *[Nationality]*, and residing at *[Address of Affiant]*, after having been duly sworn in accordance with law, do hereby depose and state that:

1. **Select one:**

- If a sole proprietorship:* I am the sole proprietor of *[Name of Bidder]* with office address at _____;
- If a partnership, corporation, cooperative, or joint venture:* I am the duly authorized and

9. [Name of Bidder] did not give or pay directly or indirectly, any commission, amount, fee, or any form of consideration, pecuniary or otherwise, to any person or official, personnel or representative of the government in relation to any procurement project or activity; and
10. [Name of Bidder] hereby assigns the following contact number/s and e-mail address/es as the official telephone/fax number and contact reference of the company where the PBAC and PCC notices may be transmitted.

Telephone No/s.: _____
 Fax No/s.: _____
 E-mail Add/s.: _____

It is understood that notices/s transmitted in the above-stated telephone/fax numbers and/or e-mail address/es are deemed received as of its transmittal and the reckoning period for the reglementary periods stated in the request documents and the revised Implementing Rules and Regulations of Republic Act No. 9184 shall commence from receipt thereof.

IN WITNESS WHEREOF, I have hereunto set my hand this ___ day of _____, 2019 at _____, Philippines.

 Merchant's Representative/Authorized Signatory

SUBSCRIBED AND SWORN to before me this ___ day of [month], [year] at [place of execution], Philippines. Affiant/s is/are personally known to me and was/were identified by me through competent evidence of identity as defined in the 2004 Rules on Notarial Practice (A.M. No. 02-8-13-SC). Affiant/s exhibited to me his/her [insert type of government identification card used], with his/her photograph and signature appearing thereon, with no. _____ .

Witness my hand and seal this ___ day of [month], [year].

NAME OF NOTARY PUBLIC

Doc. No. ____
 Page No. ____
 Book No. ____
 Series of ____.

Bid-Securing Declaration

(REPUBLIC OF THE PHILIPPINES)

CITY OF _____) S.S.

X-----X

Invitation to Bid *[Insert reference number]*

To: *[Insert name and address of the Procuring Entity]*

I/We, the undersigned, declare that:

1. I/We understand that, according to your conditions, bids must be supported by a Bid Security, which may be in the form of a Bid-Securing Declaration.
2. I/We accept that: (a) I/we will be automatically disqualified from bidding for any contract with any procuring entity for a period of two (2) years upon receipt of your Blacklisting Order; and, (b) I/we will pay the applicable fine provided under Section 6 of the Guidelines on the Use of Bid Securing Declaration, within fifteen (15) days from receipt of written demand by the procuring entity for the commission of acts resulting to the enforcement of the bid securing declaration under Sections 23.1(b), 34.2, 40.1 and 69.1, except 69.1 (f), of the IRR of RA 9184; without prejudice to other legal action the government may undertake.
3. I/We understand that this Bid-Securing Declaration shall cease to be valid on the following circumstances:
 - a. Upon expiration of the bid validity period, or any extension thereof pursuant to your request;
 - b. I am/we are declared ineligible or post-disqualified upon receipt of your notice to such effect, and (i) I/we failed to timely file a request for reconsideration or (ii) I/we filed a waiver to avail of said right;
 - c. I am/we are declared as the bidder with the Highest Rated Responsive Bid, and I/we have furnished the performance security and signed the Contract.

IN WITNESS WHEREOF, I/We have hereunto set my/our hand/s this ____ day of *[month]* *[year]* at *[place of execution]*.

[Insert NAME OF BIDDER'S AUTHORIZED REPRESENTATIVE]
[Insert signatory's legal capacity]

Affiant

SUBSCRIBED AND SWORN to before me this __ day of *[month]* *[year]* at *[place of execution]*, Philippines. Affiant/s is/are personally known to me and was/were identified by me through competent evidence of identity as defined in the 2004 Rules on Notarial Practice (A.M. No. 02-8-13-SC). Affiant/s exhibited to me his/her *[insert type of government identification card used]*, with his/her photograph and signature appearing thereon, with no. _____.

Witness my hand and seal this ____ day of *[month]* *[year]*.

NAME OF NOTARY PUBLIC

Serial No. of Commission _____
Notary Public for _____ **until** _____
Roll of Attorneys No. _____
PTR No. __, *[date issued]*, *[place issued]*
IBP No. __, *[date issued]*, *[place issued]*
Doc. No. ____
Page No. ____
Book No. ____
Series of _____.

FPF 1. FINANCIAL PROPOSAL SUBMISSION FORM

[Date]

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for [Title of Project] in accordance with your Bidding Documents dated [insert date] and our Bid (Technical and Financial Proposals). Our attached Financial Proposal is for the sum of [amount in words and figures]. This amount is exclusive of the local taxes, which we have estimated at [amount(s) in words and figures].

Our Financial Proposal shall be binding upon us subject to the modifications resulting from Contract negotiations, up to expiration of the bid validity period, i.e., [Date].

In accordance with GCC Clause **Error! Reference source not found.**, we acknowledge and accept the Procuring Entity's right to inspect and audit all records relating to our Bid irrespective of whether we enter into a contract with the Procuring Entity as a result of this Bid.

We confirm that we have read, understood and accept the contents of the Instructions to Bidders (ITB), the Bid Data Sheet (BDS), General Conditions of Contract (GCC), Special Conditions of Contract (SCC), Terms of Reference (TOR), the provisions relating to the eligibility of Consultant and the applicable guidelines for the procurement rules of the Funding Source, any and all Bid bulletins issued and other attachments and inclusions included in the Bidding Documents sent to us.

We understand you are not bound to accept any Bid you receive.

We remain,

Yours sincerely,
Authorized Signature:
Name and Title of Signatory:
Name of Firm:
Address:

FPF 2. SUMMARY OF COSTS

Costs	Currency(ies) ¹	Amount in Philippine Peso
Subtotal		
Local Taxes		
Total Amount of Financial Proposal		_____

¹ In cases of contracts involving foreign consultants, indicate the exchange rate used.

FPF 3. BREAKDOWN OF PRICE PER ACTIVITY

Activity No.: _____	Activity No.: _____	Description: _____
Price Component	Currency(ies) ²	Amount in Philippine Peso
Remuneration		
Reimbursables		
Miscellaneous Expenses		
Subtotal		_____

² In cases of contracts involving foreign consultants, indicate the exchange rate used.

FPF 4. BREAKDOWN OF REMUNERATION PER ACTIVITY

Activity No. _____		Name: _____		
Names	Position	Input ³	Remuneration Currency(ies) Rate	Amount
Regular staff				
Local staff				
Consultants				
Grand Total				_____

³ Staff months, days, or hours as appropriate.

FPF 5. REIMBURSABLES PER ACTIVITY

Activity No: _____

Name: _____

No.	Description	Unit	Quantity	Unit Price In	Total Amount In
1.	International flights _____	Trip			
2.	Miscellaneous travel expenses	Trip			
3.	Subsistence allowance	Day			
4.	Local transportation costs ⁴				
5.	Office rent/accommodation/ clerical assistance				
	Grand Total				_____

⁴ _____
⁴ Local transportation costs are not included if local transportation is being made available by the Entity. Similarly, in the project site, office rent/accommodations/clerical assistance costs are not to be included if being made available by the Entity.

FPF 6. MISCELLANEOUS EXPENSES

Activity No. _____

Activity Name: _____

No.	Description	Unit	Quantity	Unit Price	Total Amount
1.	Communication costs between _____ and _____ (telephone, telegram, telex)				
2.	Drafting, reproduction of reports				
3.	Equipment: vehicles, computers, etc.				
4.	Software				
	Grand Total				_____

FORM OF CONTRACT AGREEMENT

THIS AGREEMENT, made this *[insert date]* day of *[insert month]*, *[insert year]* between *[name and address of Procuring Entity]* (hereinafter called the “Entity”) and *[name and address of Consultant]* (hereinafter called the “Consultant”).

WHEREAS, the Entity is desirous that the Consultant execute *[name and identification number of contract]* (hereinafter called “the Works”) and the Entity has accepted the bid for *[insert the amount in specified currency in numbers and words]* by the Consultant for the execution and completion of such Consulting Services and the remedying of any defects therein.

NOW THIS AGREEMENT WITNESSETH AS FOLLOWS:

1. In this Agreement, words and expressions shall have the same meanings as are respectively assigned to them in the Conditions of Contract hereinafter referred to.
2. The following documents shall be attached, deemed to form, and be read and construed as part of this Agreement, to wit:
 - (a) General and Special Conditions of Contract;
 - (b) Terms of Reference
 - (c) Request for Expression of Interest;
 - (d) Instructions to Bidders;
 - (e) Bid Data Sheet;
 - (f) Addenda and/or Supplemental/Bid Bulletins, if any;
 - (g) Bid forms, including all the documents/statements contained in the Bidder’s bidding envelopes, as annexes, and all other documents/ statements submitted (e.g., bidder’s response to request for clarifications on the bid), including corrections to the bid, if any, resulting from the Procuring Entity’s bid evaluation;
 - (h) Eligibility requirements, documents and/or statements;
 - (i) Performance Security;
 - (j) Notice of Award of Contract and the Bidder’s conforme thereto;
 - (k) Other contract documents that may be required by existing laws and/or the Entity.
3. In consideration of the payments to be made by the Entity to the Consultant as hereinafter mentioned, the Consultant hereby covenants with the Entity to execute and complete the Consulting Services and remedy any defects therein in conformity with the provisions of this Consultant in all respects.
4. The Entity hereby covenants to pay the Consultant in consideration of the execution and completion of the Consulting Services, the Contract Price or such other sum as may become payable under the provisions of this Contract at the times and in the manner prescribed by this Contract.

IN WITNESS whereof the parties thereto have caused this Agreement to be executed the day and

year first before written.

Binding Signature of Procuring Entity

Binding Signature of Consultant

[Addendum showing the corrections, if any, made during the bid evaluation should be attached with this agreement]