

REQUEST FOR EXPRESSION OF INTEREST FOR PROCUREMENT OF CONSULTANCY SERVICES FOR THE CONDUCT OF MARKET SURVEYS AMONG CONSUMERS

1. The *Philippine Competition Commission*, through the *2021 General Appropriations Act* intends to apply the sum of **Two Million Fifty Thousand Pesos (Php2,050,000.00)**, being the Approved Budget for the Contract (ABC) to payments under the contract for the *Procurement of Consultancy Services for the Conduct of Market Surveys Among Consumers* under *Request for Expression of Interest (REI) No. 2021-06-0078*. Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
2. The *Philippine Competition Commission* now calls for the submission of eligibility documents for *Procurement of Consultancy Services for the Conduct of Market Surveys Among Consumers*. Eligibility documents of interested consultants must be duly received by the BAC Secretariat on or before **25 June 2021, 12:00NN** at **25^F Vertis North Corporate Center I, North Avenue, Quezon City**. Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion.
3. Interested bidders may obtain further information from *Philippine Competition Commission* and inspect the Bidding Documents at the address given below during *Office Hours from 9:00 A.M. to 5:00 P.M. (Monday through Friday)*.
4. The Bidding Documents – Part I may be acquired on **17 June 2021** by interested Consultants from the address below. Bidding Documents – Part II may only be acquired by Short Listed Consultants upon payment of the applicable fee for the Bidding Documents, pursuant to the latest Guidelines issued by the GPPB, in the amount of **Three Thousand Pesos (Php3,000.00)**.

It may also be downloaded free of charge from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the website of the Procuring Entity, provided that Bidders shall pay the applicable fee for the Bidding Documents not later than the submission of their bids.

5. 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 **five (5)** prospective bidders who will be entitled to submit bids. The criteria and rating system for short listing are:

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 	<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</p>	40%

	<p>results).</p> <ul style="list-style-type: none"> Engaged with at least two (2) institutions belonging to the public/government sector in similar or relevant nature of work as mentioned above 	<p>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>	
Quality of personnel to be assigned to the project	<p>Project Manager</p> <ul style="list-style-type: none"> Graduate of any degree in social sciences and research At least seven (7) years of experience with socioeconomic household survey design and implementation At least 24 hours of relevant training <p>Statistical Service Executive</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>Electronic Data Processing Manager</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>Tabulation Manager</p>	<p>Original signed curriculum vitae submitted indicating relevant work experience and educational background, and trainings attended supported by certificates of attendance / participation</p> <p>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</p>	40%
	<ul style="list-style-type: none"> Graduate of any four (4)-year degree course One (1) year of experience in data management and good command of Stata or R With at least 24 hours of relevant training <p>Field Manager</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 	<p><i>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>	
Overall work commitment	<p>At most 5 ongoing projects (including awarded but not yet started contracts)</p>	<p>Originally signed records of on-going (including awarded but not yet started contracts) and previous engagements</p> <p>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'.</p>	20%

	TOTAL		100%
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Passing Score: 85%

- 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.

- The Procuring Entity shall evaluate bids using the ***Quality Cost-Based Evaluation/Selection (QCBE/QCBS)*** procedure. The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders.
- The contract shall be completed until ***31 March 2022***.
- 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 IRR, without thereby incurring any liability to the affected bidder or bidders.
- 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) 771-9722 local 204

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

17 June 2021



JESON Q. DE LA TORRE
Chairperson, PCC Bids and Awards Committee

JD *M02*

PHILIPPINE BIDDING DOCUMENTS

PROCUREMENT OF CONSULTANCY SERVICES FOR THE CONDUCT OF MARKET SURVEYS AMONG CONSUMERS

Part I

REI No. 2021-06-0078

Government of the Republic of the Philippines
Philippine Competition Commission

June 2021

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Checklist of Eligibility Requirements

1. Eligibility documents Submission Form (Annex A)

Class “A” Documents

Legal Documents

2. Valid PhilGEPS Registration Certificate (Platinum Membership)

or

Registration certificate from:

- Securities and Exchange Commission (SEC) for partnerships or corporations; or
- Department of Trade and Industries (DTI) for sole proprietorships; or
- Cooperative Development Authority (CDA) for cooperatives.

Mayor’s permit issued by the city or municipality where the principal place of business of the prospective bidder is located

Tax Clearance per E.O. 398, s. 2005, as finally reviewed and approved by the BIR.

Technical Documents

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

Additional: Secretary’s Certificate for Authorized Signatory (Notarized)

Financial Documents

8. Audited Financial Statements (AFS) for the year 2018

Class “B” Document

Legal Documents

9. 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 success.

Section I. Request for Expression of Interest

REQUEST FOR EXPRESSION OF INTEREST FOR PROCUREMENT OF CONSULTANCY SERVICES FOR THE CONDUCT OF MARKET SURVEYS AMONG CONSUMERS

1. The *Philippine Competition Commission*, through the *2021 General Appropriations Act* intends to apply the sum of *Two Million Fifty Thousand Pesos (Php2,050,000.00)*, being the Approved Budget for the Contract (ABC) to payments under the contract for the *Procurement of Consultancy Services for the Conduct of Market Surveys Among Consumers* under *Request for Expression of Interest (REI) No. 2021-06-0078*. Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
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It may also be downloaded free of charge from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the website of the Procuring Entity, provided that Bidders shall pay the applicable fee for the Bidding Documents not later than the submission of their bids.

5. 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 *five (5)* prospective bidders who will be entitled to submit bids. The criteria and rating system for short listing are:

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>Project Manager</p> <ul style="list-style-type: none"> • Graduate of any degree in social sciences and research • At least seven (7) years of experience with socioeconomic household survey design and implementation • At least 24 hours of relevant training <p>Statistical Service Executive</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>Electronic Data Processing Manager</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>Tabulation Manager</p>	<p>Original signed curriculum vitae submitted indicating relevant work experience and educational background, and trainings attended supported by certificates of attendance / participation</p> <p>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</p>	40%

	<ul style="list-style-type: none"> • Graduate of any four (4)-year degree course • One (1) year of experience in data management 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 	<i>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>	
Overall work commitment	At most 5 ongoing projects (including awarded but not yet started contracts)	<p>Originally signed records of on-going (including awarded but not yet started contracts) and previous engagements</p> <p><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></p>	20%
	TOTAL		100%

Passing Score: 85%

- 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.

- The Procuring Entity shall evaluate bids using the **Quality Cost-Based Evaluation/Selection (QCBE/QCBS)** procedure. The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders.
- The contract shall be completed until **31 March 2022**.
- 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 IRR, without thereby incurring any liability to the affected bidder or bidders.
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THE SECRETARIAT

Bids and Awards Committee

Philippine Competition Commission

25F Tower 1, Vertis North Corporate Center,

North Avenue, Quezon City

Telephone No.: (02) 771-9722 local 204

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

17 June 2021

JERSON O. DE LA TORRE
Chairperson, PCC Bids and Awards Committee



Section II. Eligibility Documents

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 0 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. Short listed 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

Eligibility Data Sheet

Eligibility Documents	
1.2	<ul style="list-style-type: none"> • Advisory and Review Services • Management and Related Services • Other Technical Services or Special Studies
1.3	No further instructions.
2.1(a)(ii)	The statement of all ongoing and completed government and private contracts shall include all such contracts within <i>five (5) years</i> prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	Consultants must provide <i>Certificate of Good Standing, Satisfactory Completion, Project Acceptance, Certificate or equivalent document.</i>
4.2	<p>Each prospective bidder shall submit <i>one (1) original</i> and <i>two (2) copies</i> of its eligibility documents with the following labels:</p> <p>All submissions must be contained and sealed in one (1) package.</p> <p>Each sealed Bid shall be labeled as follows:</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p style="text-align: center;"><Header/Label></p> <p style="text-align: center;">ATTENTION: THE BAC CHAIRPERSON Philippine Competition Commission 25/F Tower 1, Vertis North Corporate Center, North Avenue, Quezon City</p> <p>Name of Project: _____ REI No.: _____</p> <p>Date & Time of Opening of Eligibility Documents: _____ Submitted by: _____ <u>(Bidder's name and signature)</u> Address of Bidder: _____</p> <p style="text-align: center;">“DO NOT OPEN BEFORE DATE AND TIME OF OPENING OF BIDS”</p> </div> <p><HEADER/LABEL> sample:</p> <ol style="list-style-type: none"> 1. “ORIGINAL ELIGIBILITY DOCUMENTS PLUS TWO COPIES INSIDE” – for the main envelope 2. “ORIGINAL ELIGIBILITY DOCUMENTS” – for the 1st sub-envelope

	<p>3. “COPY 1” – for the 2nd sub-envelope</p> <p>4. “COPY 2” – for the 3rd sub-envelope</p>								
4.3.(e)	<p><i>Bids and Awards Committee</i> <i>Philippine Competition Commission</i> <i>25/F Tower 1, Vertis North Corporate Center,</i> <i>North Avenue, Quezon City</i></p>								
4.3.(f)	<p>The title and reference number of the Project is:</p> <p style="text-align: center;"><i>“Procurement of Consultancy Services for the Conduct of Market Surveys among Consumers”</i></p> <p style="text-align: center;"><i>Request for Expression of Interest (REI) No. 2021-06-0078</i></p>								
5	<p>The address for submission of eligibility documents is <i>25/F Tower 1, Vertis North Corporate Center, North Avenue, Quezon City.</i></p> <p>The deadline for submission of eligibility documents is <i>25 June 2021, 12:00NN.</i></p> <p>The opening of eligibility documents is <i>via Microsoft Teams Teleconference.</i></p> <p>The date and time of opening of eligibility documents is <i>25 June 2021, 01:30PM.</i></p>								
9.1	Similar contracts shall refer to the <i>Market Surveys</i>								
9.2	<table border="1"> <thead> <tr> <th>Criteria</th> <th>Preferred qualifications</th> <th>Bases</th> <th>Weight (%)</th> </tr> </thead> <tbody> <tr> <td>Experience and Capability of the Bidder</td> <td> <ul style="list-style-type: none"> At least Five (5) years in business. Engaged with at least Five (5) 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 </td> <td> <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</p> </td> <td style="text-align: center;">40%</td> </tr> </tbody> </table>	Criteria	Preferred qualifications	Bases	Weight (%)	Experience and Capability of the Bidder	<ul style="list-style-type: none"> At least Five (5) years in business. Engaged with at least Five (5) 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 	<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</p>	40%
Criteria	Preferred qualifications	Bases	Weight (%)						
Experience and Capability of the Bidder	<ul style="list-style-type: none"> At least Five (5) years in business. Engaged with at least Five (5) 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 	<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</p>	40%						

		sector in similar or relevant nature of work as mentioned above	of completed and ongoing contracts; (c) copies of Certificate of Satisfactory Service Rendered/Certificates of Completion	
	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 socioeconomic household 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; • 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 • One (1) year of experience in data management and good command of Stata or R • With at least 24 hours of relevant training. <p><u>Field Manager</u></p>	<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</i></p>	40%

		<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 	<i>sanctions as prescribed in the Philippine Bidding Documents (PBD).</i>	
	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%
<p>No. of short-listed consultants = Five (5) Cut-off score = Eighty-Five (85) Minimum No. of key personnel = Five (5)</p>				

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:

- b) [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
- c) 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

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: _____

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



Terms of Reference

Procurement of Consultancy Services for the Conduct of Market Surveys among Consumers

I. BACKGROUND

The Philippine Competition Commission (“PCC”) is an independent quasi-judicial body mandated to implement Republic Act No. 10667 or the Philippine Competition Act (“PCA”). The PCC’s mandate includes reviewing mergers and acquisitions, investigating and adjudicating anti-competitive agreements and abuses of dominant position, and undertaking economic and legal research on competition-related matters.

Many cases or research outputs conducted by the Mergers and Acquisitions Office (MAO), the Competition Enforcement Office, or the Economics Office (EO) require the use of primary data. The limited time frame of certain projects and processes creates difficulties for Case Teams or Research Teams in providing quantitative assessments such as but not limited to relevant market, market structure, market shares, and product/service provision by concerned players.

To address this limitation, the PCC requires the service of a Survey Firm to complete the primary data gathering process (from survey design to data processing) within a short period of time for various case or research assignments. The surveys will involve households or individual consumers in the Philippines.

II. OBJECTIVES

This engagement will facilitate data gathering and facts verification among respondents pertinent to PCC cases. Data gathered will be analyzed for use in research projects handled by PCC staff, cases involving mergers and acquisitions, competition enforcement, or cases under litigation or adjudication.

The Survey Firm shall collect the data among households or individual consumers using the appropriate sampling method, e.g. Stratified Random Sampling, Stratified Systematic Sampling, Circular Systematic Sampling, Cluster Sampling, or Purposive Sampling, to be determined by the end-user.

Specifically, the survey aims to gather data on:

1. demographic and socio-economic characteristics of individual consumers by product/service in various locations;
2. types of products and services available and purchased by individual consumers based on location;
3. perceptions on product/service quality, reliability, value for money, etc.;

4. willingness to substitute selected products/services with other available products/services;
5. Other data to be identified by the end-user.

The details of the survey are summarized as follows:

Type of service	Consumer/Household Survey
Expected survey design	Simple Random Sampling, Stratified Random Sampling, Cluster Sampling, Multi-Stage Cluster Sampling, Systematic Sampling, Purposive Sampling, or other sampling methods the end-user and the survey firm may deem suitable
Target Population	Households or Individual Consumers
Survey area	National
Sample size	At least two hundred (200) respondents per survey order, for four (4) surveys
Duration of the project	Until 31 March 2022
Approved Budget for the Contract (ABC)	Two million fifty thousand pesos only (PHP 2,050,000.00)

III. BUDGET

The budget shall cover the remuneration of the service provider and the costs of conducting the survey, which will be on a per-task order basis. As part of their financial proposal, the service provider shall provide the breakdown of total expenses per survey respondent in Luzon, Visayas, and Mindanao. See Annex A.

IV. SCOPE OF WORK

Each survey under this facility shall be governed by the financial proposal submitted by the service provider and a corresponding task order to be issued by PCC. No survey may be started by the Service Provider without a corresponding task order to be issued by the PCC.

The price to be quoted in the financial proposal cannot exceed the amount indicated in the TOR. The Service Provider will only be paid for the tasks orders successfully completed.

For each task order, the scope of work includes the following:

A. Tasks

The Consultant shall carry out the following tasks:

Pre-survey Activities

1. ***Revise, test, and finalize the survey instrument and sampling design***
 - 1.1. ***Survey design***
 - 1.1.1. Review of draft survey questionnaire provided by PCC;
 - 1.1.2. Format the draft survey questionnaire into a survey instrument;

- 1.1.3. Translate the survey instrument into other languages/dialects, as necessary;
- 1.1.4. Pilot test the survey instrument on two (2) respondents and provide feedback to PCC for any possible revisions; and
- 1.1.5. Finalize the survey instrument in coordination with PCC.

1.2. Sampling design

- 1.2.1. Determine the sampling design which should include among other details the following: proposed sampling frame, type of probability sampling method, details for the selection of qualified respondent, in coordination with PCC;
- 1.2.2. Specify the sample size calculation, including among other details, the following: formula for computing the sample size, key variables for sample size calculation such as margin of error, standard deviation, level of significance, etc.;
- 1.2.3. Identify the method of selecting the qualified respondents, and the process of substitution in case of non-response;
- 1.2.4. Prepare the sampling frame of qualified respondents and submit the complete list of respondents together with their up-to-date contact details to the PCC.

1.3. Deliverables

- 1.3.1. Survey instrument for pilot testing on two (2) respondents;
- 1.3.2. Electronic files of encoded datasets and reports from the pilot testing (raw and finalized in CSV, Excel, or any other format ready for use in Stata, Python, or R) and data dictionary;
- 1.3.3. Final survey instrument in English, Filipino, and other major languages, as needed;
- 1.3.4. Final sampling design and methodology including alternative respondents in case of non-response;
- 1.3.5. Final sampling frame of qualified respondents together with their up-to-date contact details; and
- 1.3.6. Final work plan schedule from pilot testing to field work

2. Plan, design and implement training for enumerators, data encoders and field supervisors

2.1. Training and preparation of personnel

- 2.1.1. Recruit and train the enumerators and field supervisors on data collection, and on handling questions and problems that may arise during the field work;
- 2.1.2. Prepare the field work protocols for the enumerators and field supervisors; and
- 2.1.3. Prepare and submit enumerator's manual.

2.2. Deliverables

- 2.2.1. Final enumerator's manual;
- 2.2.2. Report on the composition of the field team including the number of enumerators, field supervisors and data encoding staff, and their qualifications and responsibilities; and
- 2.2.3. Report on the training of the required staff.

Data Collection, Processing and Reports

3. Survey proper

3.1. Deploy field enumerators and supervisors for actual survey

- 3.1.1. Prepare the necessary materials and equipment;

- 3.1.2. Inform PCC of the schedule of field operations and give relevant updates;
- 3.1.3. Deploy enumerators to conduct the actual survey through various methods as appropriate (e.g. telephone, video call, or in-person);
- 3.1.4. Conduct interviews through various methods as appropriate (e.g. telephone, video call, or in-person where possible) with qualified respondents for a minimum of two hundred (200) respondents for each survey; and
- 3.1.5. Report on the status of the survey, including difficulties encountered and possible deviations from the original plan

3.2. *Encode and clean data, and deliver descriptive reports of the survey result*

- 3.2.1 Encode the collected data;
- 3.2.2 Clean and validate data files; and
- 3.2.3 Prepare the descriptive report and tables of the survey results.

3.3. *Deliverables*

- 3.3.1. Protocol for data entry and quality control measures;
- 3.3.2. Electronic files of encoded datasets (raw and finalized in CSV, Excel or any other Stata or R ready format) and data dictionary; and
- 3.3.3. Electronic copy of preliminary results of the survey (e.g., frequency of responses) and the descriptive tables and report of the survey results.

Post-survey Activities

4. *Reports to PCC*

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

- 4.1.1. Deliver reports and other materials used in the survey; and
- 4.1.2. Respond to inquiries from PCC on survey implementation, and data encoding and management within four (4) weeks after the delivery of the complete set of electronic files, of datasets, and of data dictionary.

4.2. *Deliverables*

- 4.2.1. Narrative report to the PCC on the outcome of the survey including issues encountered throughout the project;
- 4.2.2. Hard copy and electronic form (in .pdf, .doc or .xlsx as applicable) of documents and other materials used in the survey; and
- 4.2.3. Written response to the PCC's inquiries, as needed.

B. Mode and length of data gathering activities

Completed survey interviews conducted through various methods as appropriate (i.e. telephone call, video call or in-person where possible) aided with a questionnaire will be done. Each interview is expected to last for twenty to forty (20 to 40) minutes.

C. Target respondents, sample size, sampling method

The target respondents of each survey are individual representatives of sample households or individual consumers. The geographic scope will depend on the needs of the PCC and will be clearly identified in the task order.

The Service Provider will propose the sampling frame, and the method of allocating and selecting the sampling and elementary units. The Service Provider may use multistage probability sampling, stratified random sampling, or any other sampling methodology as deemed appropriate by the PCC and the survey firm based on specified variables (e.g., margin of error, level of significance and standard deviation).

V. RESPONSIBILITIES OF PCC

The PCC shall assume the following obligations:

1. Provide the Consultant a directive to facilitate the execution of the consumer survey;
2. Provide the Survey Firm with the draft survey questionnaire;
3. Constantly coordinate with the Consultant on the planning and implementation of the survey to be conducted;
4. Review/approve project outputs/deliverables by Service Provider; and
5. Pay the survey firm in accordance with the set payment schedule.

The Service Provider shall be engaged by the PCC and shall submit outputs directly to the end-user's designated project manager within PCC for review and endorsement for payment.

VI. APPROVED BUDGET FOR THE CONTRACT AND MODE OF PROCUREMENT

The Approved Budget for the Contract (ABC) is **Two Million Fifty Thousand Pesos Only (PHP 2,050,000.00)**, 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 ABC shall fully cover the conduct of the survey. The cost of each survey and the corresponding amount to be paid to out to the Service Provider should not exceed the amount indicated in **Annex A**. Each survey can only be initiated by a corresponding task order to be issued by the PCC. In no cases that the total actual cost for the surveys shall exceed the ABC for this project, or the actual contract amount of the winning service provider.

For the purposes of financial proposal, use the Financial Proposal Submission Form enumerated in the PCC Request for Proposal. The ABC shall be the cap for the total financial proposal of the bidder.

Bidders shall have the flexibility to reallocate the fixed and variable costs for the household survey.

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

VII. TIMELINES, DELIVERABLES AND SCHEDULE OF PAYMENT

The Contract is expected to begin immediately after the issuance of the Notice to Award to the Service Provider. The Service Provider shall be engaged immediately after the issuance of the Notice to Proceed to the Service Provider. The PCC shall avail itself of the services of the Service Provider until **31 March 2022**.

The Service Provider shall immediately conduct a Consumer or Household Survey, upon submission of financial proposal by the survey firm and the subsequent release of the Task Order by the End-User. The Service Provider may not initiate the conduct of a survey without the corresponding issuance of a task order by the PCC.

Each task order is to be completed within **thirty-five (35) days** – with seven (7) calendar days for Pre-Survey Activities; eighteen (18) calendar days for Data Collection, Processing, and Reports; and ten (10) calendar days for Post-Survey Activities. The Service Provider shall provide its proposed implementation schedule indicating the specific activities and corresponding outputs using a Gantt Chart. The PCC and the survey firm may agree to extend the 35-day timeline and/or increase the sample size of respondents if necessary. Any extension to the 35-day timeline and/or increase in sample size of respondents will be specified in the task order.

The Service Provider must be able to conduct Consumer or Household Surveys for simultaneous projects if necessary.

Below is the summary of the deadline of submissions for each **task order**:

MILESTONES	DELIVERABLES	% of contract amount
QUANTITATIVE PHASE		
<p>Pre-survey activities</p> <ol style="list-style-type: none"> 1. Review of draft survey questionnaire provided by PCC; 2. Format the draft survey questionnaire into a survey instrument; 3. Translate the survey instrument into other languages/dialects, as necessary; 4. Pilot test the survey instrument for two (2) respondents and provide 	<p>Printed and original signed documents duly received and accepted by the PCC, as follows:</p> <ul style="list-style-type: none"> • Survey instrument for pilot testing on two (2) respondents; • Electronic files of encoded datasets and reports from the pilot testing (raw and finalized in CSV, Excel, or 	30%

<p>feedback to PCC for any possible revisions; and</p> <ol style="list-style-type: none"> 5. Finalize the survey instrument in coordination with PCC staff; and 6. Along with PCC, determine the sampling design which should include among other details the following: proposed sampling frame, type of probability sampling method, details for the selection of qualified respondent; 7. Specify the sample size calculation, including among other details, the following: formula for computing the sample size, key variables for sample size calculation such as margin of error, standard deviation, level of significance, etc.; 8. Identify the method of selecting the qualified respondents, and the process of substitution in case of non-response; 9. Prepare the sampling frame of qualified respondents and submit the complete list of respondents together with their up-to-date contact details to the PCC 10. Recruit and train the enumerators and field supervisors on data collection, and on handling questions and problems that may arise during the field work; 11. Prepare the field work protocols for the enumerators and field supervisors; and 12. Prepare and submit enumerator's manual. 	<p>any other format ready for use in Stata, Python, or R) and data dictionary;</p> <ul style="list-style-type: none"> • Final survey instrument in English, Filipino, and other major languages, as needed; • Final sampling design and methodology including alternative respondents in case of non-response; • Final sampling frame of qualified respondents together with their up-to-date contact details; and • Final work plan schedule from pilot testing to field work • Final enumerator's manual • Report on the composition of the field team including the number of enumerators, field supervisors and data encoding staff, and their qualifications and responsibilities; and • Report on the training of the required staff <p>Submission date: Within seven (7) calendar days of release of Task Order from End-User to Service Provider</p>	
<p>Data Collection and Processing</p> <ol style="list-style-type: none"> 1. Prepare the necessary materials and equipment for actual survey 2. Inform PCC of the schedule of field operations and give relevant updates 	<p>Printed and original signed documents duly received and accepted by the PCC, as follows:</p> <ul style="list-style-type: none"> • Protocol for data entry and quality control measures; • Electronic files of encoded datasets (raw and finalized in CSV, Excel or any other Stata 	<p>30%</p>

<ol style="list-style-type: none"> 3. Deploy enumerators to conduct the actual survey through various methods as appropriate (e.g. telephone, video call, in-person). 4. Conduct interviews through various methods as appropriate (e.g. telephone, video call, in-person) with qualified respondents for a minimum of two hundred (200) respondents per survey. 5. Report on the status of the survey, including difficulties encountered and possible deviations from the original plan 6. Encode the collected data; 7. Clean and validate data files; and 8. Prepare the descriptive report and tables of the survey results. 	<p>or R ready format) and data dictionary; and</p> <ul style="list-style-type: none"> • Electronic copy of preliminary results of the survey (e.g., frequency of responses) and the descriptive tables and report of the survey results. <p>Submission date: Within eighteen (18) calendar days from the acceptance of deliverables for pre-survey activities</p>	
<p>Post-survey Activities</p> <ol style="list-style-type: none"> 1. Deliver reports and other materials used in the survey; and 2. Respond to inquiries from PCC on survey implementation, and data encoding and management within four (4) weeks after the delivery of the complete set of electronic files, of datasets, and of data dictionary. 	<p>Upon receipt and acceptance by the PCC of the following:</p> <ul style="list-style-type: none"> • Narrative report to the PCC on the outcome of the survey including issues encountered throughout the project • Hard copy and electronic form (in .pdf, .doc or .xlsx as applicable) of documents and other materials used in the survey; and • Written response to the PCC’s inquiries, as needed <p>Submission date: Within ten (10) calendar days from the PCC’s acceptance of the deliverables for data collection and processing</p>	<p>40%</p>

TOTAL	Completion of Consumer or Household Survey within thirty-five (35) calendar days from the issuance of the Task Order by the End-User	100%
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Note: If the task order provides for a timeline greater than thirty-five (35) days and/or provides for a sample size greater than two hundred respondents (200), the adjusted submission dates will also be reflected in the task order.

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.

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.

VIII. 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.

To determine if the prospective bidder is eligible to participate in the bidding of this Project, all the legal, technical and financial documents enumerated in the PCC Request for Proposal, and other relevant documents necessary for evaluation as identified in this TOR and other relevant provisions of the RIRR of R.A. No. 9184 should be submitted and be present upon opening of the bids.

Only eligible bidders will be considered for shortlisting. The following are the minimum qualifications required for this Project and shall be evaluated based on the documents submitted by the bidder:

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 	Records of previous engagement and quality of performance in projects related to competition and other similar fields, and geographical distribution	40%

Criteria	Minimum Qualifications	Bases	Weight (%)
	<p>and sampling designs, provision of trainings for enumerators, data encoders, etc., conduct of survey, collection and analysis of data, and reporting of survey results)</p> <ul style="list-style-type: none"> Engaged with at least two (2) institutions belonging to the public/government sector in similar or relevant nature of work as mentioned above 	<p>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>	
<p>Quality of personnel to be assigned to the project</p>	<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 socioeconomic household 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; With at least 24 hours of relevant training <p><u>Tabulation Manager</u></p>	<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</i></p>	<p>40%</p>

Criteria	Minimum Qualifications	Bases	Weight (%)
	<ul style="list-style-type: none"> Graduate of any four (4)-year degree course One (1) year of experience in data management 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 	<i>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>	
Overall work commitment	At most 5 ongoing projects (including awarded but not yet started contracts)	<p>Originally signed records of on-going (including awarded but not yet started contracts) and previous engagements</p> <p><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></p>	20%
TOTAL			100%

A maximum of five (5) eligible bidders that will get at least 85 points based on the criteria above shall be invited to offer technical and financial proposals.

IX. SELECTION CRITERIA

The technical and financial proposals of the shortlisted bidders will be evaluated using the Quality Cost-Based Evaluation (QCBE), pursuant to the pertinent provisions of R.A. No. 9184 or the Government Procurement Reform Act. The 60% - 40% quality to cost ratio shall be used for this purpose and shall be allocated as follows:

Criteria	Bases	Weight (%)
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Technical Proposal		60%
Quality of personnel to be assigned to the project (25%)	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	
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	
Overall work commitment (5%). 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>	
Financial Proposal		40%
TOTAL		100%

The bidder with the highest rated score based on the technical proposal submitted, provided that the score shall pass the hurdle rate of 85 points, all eligible documents and other relevant documents for the procurement of this project are legal and valid in reference to the requirements of R.A. No. 9184, shall be the Highest Rated and Responsive Bidder.

X. CONFIDENTIALITY OF DATA AND INFORMATION

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

The Service Provider shall be engaged by the PCC and shall submit outputs directly to the designated project manager within PCC for review and endorsement for payment. All the materials, data and information used and generated through the issues paper will be the sole property of PCC. The service provider shall not use nor disseminate these documents for their own research purposes outside of the required outputs of the PCC without the written consent of the PCC.

All data, documents, records, configuration files and metadata (collectively “Information”) to be provided to the bidders for purposes of delivering the Services are considered confidential information and shall remain the sole property of PCC. The Service Provider 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. Bidders shall not use the Information for any purpose other than in connection with the Services. Bidders 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.

XI. LIQUIDATED DAMAGES

If the Surveying Firm 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.

XII. 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

Annex A

RATING CRITERIA FOR EVALUATION OF TECHNICAL PROPOSAL

Estimated Cost per Survey (sample size = 200)		
Area	Means of Contact	Estimated Amount (in PhP)
NCR or GMA (please specify which area)	Face-to-face	
	Telephone	
	Online	
Balance Luzon	Face-to-face	
	Telephone	
	Online	
Visayas	Face-to-face	
	Telephone	
	Online	
Mindanao	Face-to-face	
	Telephone	
	Online	

Name and Signature of Authorized Representative

Date Signed

Annex B

RATING CRITERIA FOR EVALUATION OF TECHNICAL PROPOSAL

CRITERIA	PARAMETERS	RATING SYSTEM		WEIGHT (%)
Applicable experience of the firm (20%)	Number of years in operations/existence	100	In the business for ten (10) years or more	60%
		90	Six to nine (6-9) years in business	
		85	At least five (5) years in business	
		0	With less than five (5) years in business	
	Number of completed similar/relevant projects	100	Engaged with ten (10) or more companies/institutions in similar or relevant nature of work	20%
		90	Engaged with six to nine (6-9) companies/institutions in similar or relevant nature of work	
		85	Engaged with at least five (5) companies/institutions in similar or relevant nature of work	
		0	Engaged with less than five (5) companies/institutions in similar or relevant nature of work	
	Number of completed similar/relevant projects with public/government sector	100	Engaged with more than five (5) institutions belonging to the public/government sector in similar or relevant nature of work	20%
		90	Engaged with three to five (3 to 5) institutions belonging to the public/government sector in similar or relevant nature of work	
		85	Engaged with at least two (2) institutions belonging to the public/government sector in similar or relevant nature of work	
		0	Engaged with less than two (2) institutions belonging to the public/government sector in similar or relevant nature of work	

Quality of Personnel (25%)	Educational attainment of the Project Manager	100	With PhD or Doctorate degree	10%
		90	With Master of Sciences/Arts degree	
		85	With Bachelor of Sciences/Arts degree	
		0	Educational attainment below a Bachelor of Sciences/Arts degree, or degree attained is not from allied courses	
	Educational attainment of the Statistical Service Executive	100	With PhD or Doctorate degree	10%
		90	With Master of Sciences/Arts degree	
		85	With Bachelor of B.S. Statistics	
		0	Educational attainment below a Bachelor of Sciences/Arts degree, or degree attained is not B.S. Statistics	
	Educational attainment of the Electronic Data Processing Manager, Tabulation Manager, Field Manager	100	With PhD or Doctorate degree	5% per identified position
		90	With Master's Degree	
		85	Graduate of any 4-year degree course	
		0	Educational attainment below a Bachelor of Sciences/Arts degree	
Years of experience of the Project Manager	100	With more than ten (10) years of experience in socioeconomic household survey design and implementation	15%	
	90	With eight to ten (8-10) years of experience in socioeconomic household survey design and implementation		
	85	With at least (7) years of experience in socioeconomic household survey design and implementation		

		0	With less than seven (7) years of experience in socioeconomic household survey design and implementation	
	Years of experience of the Statistical Service Executive	100	With more than eight (8) years of experience in statistical techniques and sampling design	10%
		90	With six to eight (6-8) years of experience in statistical techniques and sampling design	
		85	With at least five (5) years of experience in statistical techniques and sampling design	
		0	With less than five (5) years of experience in statistical techniques and sampling design	
	Years of experience of the Electronic Data Processing Manager, Tabulation Manager, Field Manager	100	With more than five (5) years of experience in designing a system to input and manage data and good command of Stata or R	5% per identified position
		90	With two to five (2-5) years of experience in designing a system to input and manage data and good command of Stata or R	
		85	With at least one (1) year of experience in designing a system to input and manage data and good command of Stata or R	
		0	With less than one (1) year of experience in designing a system to input and manage data and good command of Stata or R	
	Number of hours of relevant training of all personnel	100	With more than 48 hours of relevant training	5% per position
		90	With 25-48 hours of relevant training	
		85	With 24 hours of relevant training	
		0	With less than 24 hours of relevant training	
	Timing of Deliverables	100	Very Good	20%

<p>Work Plan and Methodology</p> <p>(50%)</p>			The timeline of deliverables allows for submission at least 5 days before the deadline set by the PCC.	
		90	Good The timeline of deliverables allows for submission 2-4 days before the deadline set by the PCC.	
		85	Satisfactory The timeline of deliverables allows for submission by the deadline set by the PCC.	
		0	Poor The timeline of deliverables allows for submission after the deadline set by the PCC.	
	<p>Comprehensive Survey Plan for the following methodologies:</p> <p>(1) Probability Sampling Method (e.g. multistage, stratified, cluster, etc.)</p> <p>(2) Non-Probability Sampling Method (e.g. purposive, quota, etc.)</p>	100	Very Good Characteristics under “good” are present with additional activities/recommendations that add value to the project. Important issues are approached in an innovative and efficient way, indicating that the offeror has understood the main issues of the assignment and has outstanding knowledge of new solutions. The proposal details ways to improve the results and the quality of the assignment by using various approaches, methodologies, and knowledge.	40%
		90	Good The proposed approach is discussed in full detail, and the methodology is specifically tailored to the characteristics of the assignment and flexible enough to allow its adaptation to change that may occur during project execution.	
		85	Satisfactory	

			All key activities are included in the activity plan, but they are not detailed. There are minor inconsistencies between timing, assignment outputs, and proposed approach.	
		0	Poor Most key activities are included in the activity plan, but they are not detailed. There are major inconsistencies between timing, assignment outputs, and proposed approach. Although the approach and methodology are suitable, they do not include a discussion on how the offeror proposes to deal with critical characteristics of the assignment.	
	Quality Control	100	Good The service provider submits existing and exhaustive quality control measures to ensure the level of output.	20%
		85	Satisfactory The service provider has existing and adequate quality control measures to ensure the level of output.	
		0	Poor The service provider does not submit any quality control measures, or submits insufficient quality control measures to ensure the level of output.	
	Other Policies	100	Good The service provider submits existing and exhaustive policies pertaining to the following: refusal rate, minimum number of callbacks, and attrition rate, among others.	20%
		85	Satisfactory	

			The service provider has existing and adequate policies pertaining to the following: refusal rate, minimum number of callbacks, and attrition rate, among others.	
		0	Poor The service provider does not submit any policies, or submits insufficient policies pertaining to the following: refusal rate, minimum number of callbacks, and attrition rate, among others.	
Overall work commitment (5%)	Number of on-going (including awarded but not yet started contracts)	100	With zero to four (0-4) on-going projects	100%
		80	With five (5) on-going projects	
		0	With more than five (5) on-going projects	

Financial Proposal

Rating = (LAP / AOP) x % Allocation

Where: AOP = amount of offer in the financial proposal

LAP = lowest amount offered among offerors

% Allocation = percentage assigned to the financial proposal