

REQUEST FOR PROPOSAL

Procurement of Consultancy Services for the Conduct of Market Surveys among Micro, Small and Medium Enterprises for PCC Cases and other Research Initiatives

P.R. No./Date Received: **2022-03-0056 / 13 April 2022**

RFQ/P No. / Date: **2022-04-0061 / 19 April 2022**

The Philippine Competition Commission invites all eligible and PhilGEPS-registered suppliers, contractors and consultants to quote the best offer for the described item in the attached **Terms of Reference / Technical Specifications Sheet** subject to the Terms and Conditions and within the **Approved Budget for the Contract**.

Required Documents/Information to be submitted as Attachments to the Quotation/Proposal:

- Mayor's/Business Permit / BIR Certificate of Registration in case of individual.
- PhilGEPS Registration Number
- Latest Income/Business Tax Return
- Omnibus Sworn Statement (Notarized Omnibus Sworn Statement to be submitted prior to issuance of Award)
- Curriculum Vitae / Professional License
- Signed/Conformed Terms of Reference
- List of Ongoing projects (including awarded by not yet started contracts)
- Proposed Plan of Approach / Methodology
- Company Profile

This pro-forma quotation may be submitted through **registered** or **electronic mail** to the PCC Bids and Awards Committee (PBAC) Secretariat at above address or email to procurement@phcc.gov.ph or rvillanueva@phcc.gov.ph on or before **25 April 2022, 05:00 PM** subject to the following **Terms and Conditions**:

1. All entries shall be typed or written in a clear legible manner.
2. No alternate quotation/offer is allowed, suppliers who submitted more than one quotation shall be automatically disqualified.
3. All prices offered herein are valid, binding and effective for THIRTY (30) calendar days upon issuance of this document. Alternative bids shall be rejected.
4. Price quotations to be denominated in Philippine Peso shall include all applicable government taxes subject to **(BIR 2306) 5% R-VAT** and **(BIR 2307) 1% (PO) or 2% (JO) deductions**.
5. PCC PBAC Technical Working Group may require you to submit documents that will prove your legal, financial and technical capability to undertake this contract.
6. Salient provisions of the IRR of RA 9184: Section 68 - Liquidated Damages and Section 69 - Imposition of Administrative Penalties shall be observed.
7. PCC reserves the right to reject any and all quotations, declare a failure, or not award the contract pursuant to Sec 41 of the same IRR.
8. In case of tie quotations, suppliers' presence are required during tie breaking through draw lots or toss coin.
9. In case supplier pro forma quotation is submitted, conditions will be governed by the submitted signed Terms of Reference.

Very truly yours,


ATTY. JOSEPH MELVIN B. BASAS
PBAC Chairperson

Item	QTY	ABC	Project Title	Total Amount
				(To be filled-up by the supplier)
1	1	₱ 800,000.00	Procurement of Consultancy Services for the Conduct of Market Surveys among Micro, Small and Medium Enterprises for PCC Cases and other Research Initiatives	
			(Please see attached Terms of Reference)	
Total Lot ABC		₱ 800,000.00	TOTAL Lot Amount:	
Delivery Instructions:				<i>Please see attached Terms of Reference</i>

(Please provide **complete** information below)

We undertake, if our Proposal is accepted, to supply/deliver the goods in accordance with the specifications and/or delivery schedule.

We agree to abide by this proposal for the price validity period specified in the terms and conditions and it shall remain binding upon us and may be accepted at any time before the expiration of that period.

Until a Purchase/Job Order or a Contract is prepared and executed, this Quotation/Proposal shall be binding upon us. We understand that you are not bound to accept the lowest or any Proposal you may receive.

Signature over Printed Name : _____

Designation/Position : _____

Name of Company : _____

Address : _____

Telephone / Fax : _____

E-mail Address: _____

Company Tax Identification Number : _____

TERMS OF REFERENCE

Procurement of Consultancy Services for the Conduct of Market Surveys among Micro Small and Medium Enterprises for PCC Cases and Other Research Initiatives

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, the Competition Enforcement Office, or the Economics Office 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. The surveys will involve Micro, Small, and Medium Enterprises (MSMEs) in the Philippines.

II. OBJECTIVES

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

Specifically, the market survey aims to gather data on:

- A. Business information of MSMEs in various locations, including the following:
 1. business classification
 2. employee size
 3. complete business address
 4. contact number and email addresses.
- B. Types of products and services available and offered to consumers/customers based on location.
- C. Information on target and/or usual consumers/customers, including:
 1. socioeconomic class/entity type
 2. income levels/volume of purchase
 3. residence distance to the business establishment/entity

- D. Perceptions on product/service quality, opportunities for profitability, competitive environment, etc.
- E. Willingness to offer or substitute selected products/services with other available products/services.
- F. Other data to be identified by the end-user.

III. SCOPE OF WORK

The details of the engagement are summarized as follows:

Type of service	Market Survey among MSMEs in the Philippines
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	Business owners or representatives of selected MSMEs
Survey area	Nationwide
Sample size	At least sixty (60) MSMEs per survey, for two (2) firm surveys
Duration of the project	Until 31 March 2023
Approved Budget for the Contract (ABC)	Eight hundred thousand pesos only (PHP 800,000.00)

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.

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) business owners or representatives of MSMEs;
- 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 MSMEs 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) with qualified respondents for a minimum of sixty (60) 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) 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, AND SAMPLING METHOD

The target respondents of the market survey are the business owners, decision makers, and/or representatives of the nationwide sample of MSMEs. **For each survey, the target sample size is at least sixty (60) completed interviews.** 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).

IV. RESPONSIBILITIES OF PCC

The PCC shall assume the following obligations:

- A. Provide the Consultant a directive to facilitate the execution of the MSME market survey;
- B. Provide the Survey Firm with the draft survey questionnaire;
- C. Constantly coordinate with the Survey Firm on the planning and implementation of the survey to be conducted;
- D. Review/approve project outputs/deliverables by Service Provider; and
- E. 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.

V. APPROVED BUDGET FOR THE CONTRACT AND MODE OF PROCUREMENT

The Approved Budget for the Contract (ABC) is **Eight hundred thousand pesos only (PHP 800,000.00)**, 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 budget shall cover the remuneration of the service provider and the costs of conducting the surveys. For the purposes of financial proposal, use the Financial Proposal Submission Form enumerated in the PCC Request for Proposal. In addition, the service provider shall provide the breakdown of total expenses per survey respondent in Luzon, Visayas, and Mindanao (See Annex A).

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 this engagement.

The mode of procurement shall be Negotiated Procurement – Small Value Procurement as provided under the Revised Implementing Rules and Regulations (IRR) of Republic Act (R.A.) No. 9184.

VI. TIMELINES, DELIVERABLES AND SCHEDULE OF PAYMENT

The Contract is expected to begin immediately after the issuance of the Notice of Award or Notice to Proceed to the Service Provider. The PCC shall avail itself of the services of the Service Provider until **31 March 2023**.

The Service Provider shall immediately conduct a Market Survey for MSMEs, upon submission of the 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) calendar 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 depending on the complexity of the data gathering. Any extension to the 35-day timeline and/or increase in sample size of respondents should be specified in the task order.

The **tranche payment schedule** shall be as follows:

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 feedback to PCC for any possible revisions; and 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 	<p>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) business owners / representatives; • 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; • 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>30%</p>

<p>problems that may arise during the field work;</p> <ol style="list-style-type: none"> 11. Prepare the field work protocols for the enumerators and field supervisors; and 12. Prepare and submit enumerator's manual. 	<p>Submission date: Within seven (7) calendar days of release of Task Order from End-User to Service Provider</p> <p>Submissions by the supplier and acknowledgement of receipt and acceptance by PCC may be transmitted electronically, unless printed original signed documents are required by PCC in the task order.</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; 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 sixty (60) respondents for each 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>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 or R ready format) and data dictionary; and • 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>Submissions by the supplier and acknowledgement of receipt and acceptance by PCC may be transmitted electronically, unless printed original signed documents are required by PCC in the task order.</p>	<p>30%</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 	<p>40%</p>

	<ul style="list-style-type: none"> 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>	
TOTAL	Completion of Market Survey for MSMEs within thirty-five (35) calendar days from the issuance of the Task Order by the End-User	100%

Note: If the task order provides for a timeline greater than thirty-five (35) days and/or provides for a sample size greater than sixty (60) respondents per survey, the adjusted submission dates should 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 and electronic documents to be submitted to the PCC should be properly and duly signed or acknowledged 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.

VII. 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.

A. Eligibility of the Prospective Bidder/s

To determine if the prospective bidder is eligible to participate in this bidding, legal, technical, and financial documents shall be submitted, as stated in the Invitation to Apply for Eligibility and to Bid (IAEB) and the Instructions to Bidders (ITB) and required documents pursuant to Sections 24.1 and 24.3 of the revised IRR of RA No. 9184.

B. Shortlisting of Eligible Bidder/s

Only eligible bidders will be considered for shortlisting. Pursuant to Section 24.5.3 of the revised IRR of RA 9184, the following criteria shall be considered in short listing the eligible prospective bidders:

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 the core members of the project team, 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 and/or enterprise 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 sanctions as prescribed in the Philippine Bidding Documents (PBD).</i></p>	40%

CRITERIA	MINIMUM QUALIFICATIONS	BASES	WEIGHT (%)
	<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%
TOTAL			100%

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

C. Evaluation of The Technical and Financial Proposals of the Shortlisted Bidders

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 (%)
Technical Proposal		60%
Experience and capability of the service provider (20%)	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	
Quality of personnel to be assigned to the project (30%)		
Plan of approach and methodology (50%)		
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.

VIII. 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.

IX. 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.


X. 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
BREAKDOWN OF TOTAL EXPENSES PER SURVEY RESPONDENT

AREA	MEDIUM	ESTIMATED AMOUNT (in PhP)
NCR	Face-to-face	
	Telephone	
	Online	
Bulacan, Cavite, Laguna, Rizal, and other provinces near NCR. <i>(Please specify others, if any)</i>	Face-to-face	
	Telephone	
	Online	
Balance Luzon	Face-to-face	
	Telephone	
	Online	
Visayas	Face-to-face	
	Telephone	
	Online	
Mindanao	Face-to-face	
	Telephone	
	Online	
Nationwide	Face-to-face	
	Telephone	
	Online	

**As explained in Section V “Budget” of the Terms of Reference*

Name and Signature of Authorized Representative

Date Signed

ANNEX B
RATING CRITERIA FOR SHORTLISTING ELIGIBLE BIDDER/S PROPOSAL

CRITERIA	PARAMETERS	RATING SYSTEM		WEIGHT (%)	
Applicable experience of the firm (40%)	Number of years in operations/existence	100	In the business for more than 10 years	40%	
		90	6 to 9 years in business		
		85	At least 5 years in business		
		0	With less than 5 years in business		
	Number of organizations engaged, as specified in the TOR	100	Engaged with more than 8 organizations 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)		25%
		90	Engaged with 6 to 8 organizations 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)		
		85	Engaged with at least 5 organizations 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)		
		0	Engagements with less than five organizations 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), or at least one project rated below “Above Satisfactory”		
	Number of government organizations engaged as specified in the TOR	100	Engaged with more than 5 organizations belonging to the public sector in similar or relevant nature of work as mentioned above		25%
		90	Engaged with 3 to 5 organizations belonging to the public sector in similar or relevant nature of work as mentioned above		
		85	Engaged with 2 organizations belonging to the public sector in similar or relevant nature of work as mentioned above		
		0	Engaged with less than two organizations belonging to the public sector in similar or relevant nature of work as mentioned above, or at least one project rated below “Above Satisfactory”		
Existence of up-to-date database of qualified respondents	100	There is an existing and comprehensive up-to-date database of qualified respondents		10%	
	85	There is an existing and adequate up-to-date database of qualified respondents			
	0	No existing up-to-date database, or insufficient database of qualified respondents			

Quality of Personnel (40%)	Educational attainment ¹ of the Project Manager	100	With PhD or Doctorate degree relevant to the field of requirement	15%
		90	With Master of Sciences/Arts degree / PhD or Doctorate Degree not relevant to the field	
		85	With Bachelor of Sciences/Arts degree / Master Degree not relevant to the field	
		0	Educational attainment below a Bachelor of Sciences/Arts degree, or degree attained is not from allied courses	
	Educational attainment ² of the Statistical Service Executive	100	With PhD or Doctorate degree	10%
		90	With Master of Sciences/Arts degree / PhD or Doctorate Degree not relevant to the field	
		85	With Bachelor of Sciences/Arts degree / Master Degree not relevant to the field	
		0	Educational attainment below a Bachelor of Sciences/Arts degree, or degree attained is not from allied courses	
	Educational attainment of the Electronic Data Processing Manager	100	With PhD or Doctorate degree	10%
		90	With Master of Sciences/Arts degree or other fields	
		85	With Bachelor of Sciences/Arts degree or other fields	
		0	Educational attainment below a Bachelor of Sciences/Arts degree	
	Educational attainment of the Tabulation Manager	100	With PhD or Doctorate degree	5%
		90	With Master of Sciences/Arts degree or other fields	
		85	With Bachelor of Sciences/Arts degree or other fields	
		0	Educational attainment below a Bachelor of Sciences/Arts degree	
	Educational attainment of the Field Manager	100	With PhD or Doctorate degree	5%
		90	With Master of Sciences/Arts degree or other fields	
		85	With Bachelor of Sciences/Arts degree or other fields	
		0	Educational attainment below a Bachelor of Sciences/Arts degree	
Years of experience of the Project Manager	100	With more than 10 years of experience in socioeconomic household survey design and implementation	15%	
	90	With 8-10 years of experience in socioeconomic household survey design and implementation		
	85	With 7 years of experience in socioeconomic household survey design and implementation		
	0	With less than 7 years of experience in socioeconomic household survey design and implementation		

¹ Preferably in any of the following: Psychology, Public Administration / Management, Social Science, or other allied courses

² Preferably in Statistics

	Years of experience of the Statistical Service Executive	100	With more than 8 years of experience in statistical techniques and sampling design	10%
		90	With 6-8 years of experience in statistical techniques and sampling design	
		85	With 5 years of experience in statistical techniques and sampling design	
		0	With less than 5 years of experience in statistical techniques and sampling design	
	Years of experience of the Electronic Data Processing Manager	100	With more than 5 years of experience in designing a system to input and manage data and good command of Stata or R	10%
		90	With 3-5 years of experience in designing a system to input and manage data and good command of Stata or R	
		85	With 2 years of experience in designing a system to input and manage data and good command of Stata or R	
		0	With less than 2 years of experience in designing a system to input and manage data and good command of Stata or R	
	Years of experience of the Tabulation Manager	100	With more than 5 years of experience in designing a system to input and manage data and good command of Stata or R	5%
		90	With 3-5 years of experience in designing a system to input and manage data and good command of Stata or R	
		85	With 2 years of experience in designing a system to input and manage data and good command of Stata or R	
		0	With less than 2 years of experience in designing a system to input and manage data and good command of Stata or R	
	Years of experience of the Field Manager	100	With more than 5 years of experience in managing the conduct of surveys	5%
		90	With 3-5 years of experience in managing the conduct of surveys	
		85	With 2 years of experience in managing the conduct of surveys	
		0	With less than 2 years of experience in managing the conduct of surveys	
Number of hours of relevant training ³ of all personnel	100	With more than 48 hours of relevant training	2% for each required 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		
Current work-load relative to capacity (20%)	Current work-load relative to capacity	100	With less than 2 market research projects	100%
		90	With 2 to 4 market research projects	
		85	With 5 market research projects	
		0	With more than 5 market research projects	

³ Relevant training in project management, survey design and sampling, statistical computing, data manipulation

ANNEX C
RATING CRITERIA FOR EVALUATION OF THE TECHNICAL AND FINANCIAL PROPOSAL

CRITERIA	PARAMETERS	RATING SYSTEM		WEIGHT (%)
Experience and capability of the survey firm (20%)	Years in Business	100	More than 3 years operating as a survey firm	20%
		85	3 years in operation as a survey firm	
		0	Less than 3 years operating as a survey firm	
	Engaged with at least five (5) companies/institutions	100	Had been engaged with more than five (5) companies/institutions	15%
		85	Had been engaged with more than five (5) companies/institutions	
		0	Had been engaged with less than five (5) companies/institutions	
	Engaged with at least two (2) government/public office	100	Had been engaged with more than two (2) government/public offices	15%
		85	Had been engaged with two (2) government/public offices	
		0	Had been engaged with less than two (2) government/public office	
	Single largest project within the past five (5) years	100	More than the ABC	20%
		85	Equal to the ABC	
		0	Less than the ABC	
	Total value of projects within contract period (completed)	100	More than the ABC	20%
		85	Equal to the ABC	
		0	Less than the ABC	
Total value of projects within contract period (on-going)	100	More than the ABC	10%	
	85	Equal to the ABC		
	0	Less than the ABC		
Quality of Personnel (30%)	Project manager: Educational Attainment	100	PhD in in the field/s (or related field/s) specified in the minimum qualifications	15%
		90	MS/MA holder in the field/s (or related field/s) specified in the minimum qualifications	
		85	BS / BA degree holder in the field/s specified in the minimum qualifications	
		0	No degree	
	Project manager: Training	100	With more than 16 hours of relevant training	10%
		85	With 16 hours of relevant training	
		0	With less than 16 hours or less of relevant training	
	Project manager: Work Experience	100	With more than 7 years of experience in handling socioeconomic consumer survey design and implementation.	10%
		85	With 7 years of experience in handling socioeconomic consumer survey design and implementation.	
		0	With less than 7 years of experience in handling socioeconomic consumer survey design and implementation.	
	Statistical Service Executive:	100	PhD in in the field/s (or related field/s) specified in the minimum qualifications	15%

	Educational Attainment	90	MS/MA holder in the field/s (or related field/s) specified in the minimum qualifications	
		85	BS / BA degree holder in the field/s specified in the minimum qualifications	
		0	No degree	
	Statistical Service Executive: Training	100	With more than 16 hours of relevant training	10%
		85	With 16 hours of relevant training	
		0	With less than 16 hours or less of relevant training	
	Statistical Service Executive: Work Experience	100	With more than 5 years of experience in handling socioeconomic consumer survey design and implementation.	10%
		85	With 5 years of experience in handling socioeconomic consumer survey design and implementation.	
		0	With less than 5 years of experience in handling socioeconomic consumer survey design and implementation.	
	Electronic Data Processing Manager: Educational attainment	100	PhD or MS/MA degree holder	6%
		85	BS/BA holder of any 4-year degree course	
		0	No degree	
	Electronic Data Processing Manager: Work Experience	100	With more than 2 years of experience in designing a system to input	6%
		85	With 2 years of experience in designing a system to input and manage data	
		0	With less than 2 years of experience in designing a system to input and manage data	
Electronic Data Processing Manager: Knowledge in Stata Use	100	With training in the use of Stata	3%	
	0	No training in the use of Stata		
Field Manager: Educational attainment	100	PhD or MS/MA degree holder	7%	
	85	BS/BA holder of any 4-year degree course		
	0	No degree		
Field Manager: Work Experience	100	With more than 2 years of experience in consumer-level survey	8%	
	85	With 2 years of experience in consumer-level survey		
	0	With less than 2 years of experience in consumer-level survey		
Plan of approach and methodology (50%)	Timing of Deliverables	100	Very Good The deliverables are for submission at least two to four days before the required timeline and schedule set by the PCC	20%
		85	Good The deliverables are for submission on the day of the schedule set by the PCC	
		0	Poor The proposal indicates late submission of the required deliverables	
	Comprehensiveness of field survey plan including protocols for the deployment of enumerators and	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,	25%

	substitution of respondents		indicating that the offeror have understood the main issues of the assignment and have 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.	
		85	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 changes that may occur during project execution.	
		0	Poor The steps to carry out the different activities of the TOR is discussed generically. The approach is standard and not specifically tailored to the assignment. Although the approach and methodology are suitable, they don't include a discussion on how the offeror proposes to deal with critical characteristics of the assignment.	
	Sampling Design	100	Very Good Sampling Design submitted is compliant with the requirements in the Terms of Reference	25%
		85	Good Sampling Design submitted has identified deviation from the requirements in the Terms of Reference, but the survey can still be conducted with acceptable results	
		0	Poor Sampling design is discussed generically, and the specific information are not tailored to the assignment, thus, it is deemed that the survey cannot be conducted with acceptable results	
	Quality control measures to be used during data collection, data entry and data cleaning	100	Very Good Quality control measures submitted are carefully designed and compliant with the requirements in the Terms of Reference	15%
		85	Good Quality control measures submitted have identified deviation from the requirements in the Terms of Reference, but the survey can still be conducted with acceptable results	
		0	Poor Quality control measures submitted are generic, and the specific information are not tailored to the assignment, thus, it is deemed that the survey cannot	
	Existing policies of the firm pertaining to the following: refusal rate, minimum no. of callbacks and attrition rate, if any	100	Submission of Existing policies of the firm pertaining to the following: refusal rate, minimum no. of callbacks and attrition rate, if any	15%
0		Non-submission of Existing policies of the firm pertaining to the following: refusal rate, minimum no. of callbacks and attrition rate, if any		

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
