

Section II. Eligibility Documents

Notes on the Eligibility Documents

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

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

1. Eligibility Criteria

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

2. Eligibility Requirements

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

(a) Class “A” Documents –

Legal Documents

(i) PhilGEPSCertificate 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 PhilGEPSC 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

Notes on the Eligibility Data Sheet

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

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

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

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

Eligibility Data Sheet

Eligibility Documents	
1.2	<p><i>State the types and fields of Consulting Services that will be performed in relation to the Project and the appropriate GoP regulatory body, if any.</i></p> <p><i>Customer Satisfaction Survey</i></p>
1.3	No further instructions.
2.1(a)(i)	<p>The Bidder shall also submit the following “Class A” documents with the Valid PhilGEPS Certificate of Registration:</p> <ol style="list-style-type: none"> 1. Valid DTI Registration Certificate; 2. Valid Mayor’s/Business Permit or its Equivalent Document; 3. Valid Tax Clearance; 4. Audited Financial Statement for the last two (2) consecutive years
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)	<i>Certificate of Satisfactory Completion</i>
4.2	<p>Each Bidder shall submit one (1) soft copy of the eligibility proposal as following the instructions given in Eligibility Data Sheet Section 2.1 (a-b)</p> <p><i>Further, within two (2) days after being passed the eligibility stage, the bidder shall submit two (2) hardcopies of the documents submitted online. The hardcopy will be used for evaluation by the Technical Working Group (TWG) to determine authenticity and consistency with the previously submitted softcopy. Failure to submit the hardcopy within the period set shall be a ground for “disqualification”. Please note that the content of the hardcopy and the softcopy (submitted online) should be EXACTLY the same. A Certification on this shall be filled out and submitted by the prospective bidder. This will be required during the submission of the Hardcopy of your Bid proposal. Failure to submit the required Certification and/or any discrepancy found between the softcopy and hardcopy shall be a ground for disqualification.</i></p>
4.3 (e)	<p><i>State the Bids and Awards Committee of the Procuring Entity concerned with the Project.</i></p> <p><i>Bids and Awards Committee</i></p> <p><i>BAC Secretariat</i></p>

	<p>The Procuring Entity's address is:</p> <p>7th Floor, Tower 1 Double Dragon Plaza Double Dragon Meridian Park Macapagal Avenue corner Edsa Extension Bay Area Pasay City</p> <p><i>Contact Person:</i> Sunshine Rhina R. Caunin</p> <p>Head, BAC Secretariat</p> <p>249-5986 loc. 713 or 714</p> <p>tieza.bacsecretariat.gov.ph</p> <p>http://www.tieza.gov.ph</p> <p>Please email the following:</p> <p>For inquiries/concerns: <u>bacsecretariat@tieza.gov.ph</u></p> <p><u>For purchase of eligibility documents:</u> <u>tieza.bacsecretariat@gmail.com</u></p> <p><u>For online submission: tiezabac.online@gmail.com</u></p>
4.3 (f)	<p><i>State specific details concerning the identification of the Project</i></p> <p>CONSULTANCY SERVICES FOR A THIRD PARTY CUSTOMER SATISFACTION SURVEY</p> <p><i>REQUEST FOR EXPRESSION OF INTEREST</i></p> <p>No. 20-10-0006</p>
5	<p>The address for submission of eligibility documents is</p> <p><i>BAC Secretariat</i></p> <p>7th Floor, Tower 1 Double Dragon Plaza Double Dragon Meridian Park Macapagal Avenue corner Edsa Extension Bay Area Pasay City</p> <p>Bidders shall submit their <u>archived and password-protected</u> online eligibility proposals in reflecting the name of the project</p> <p>Please indicate the following in the email subject:</p> <ul style="list-style-type: none"> • Name of the Project/ELIGIBILITY PROPOSAL <p>on or before 5 November 2020 at 9:30 A.M to the TIEZA BAC Secretariat through a soft copy sent via e-mail to <u>tiezabac.online@gmail.com</u>, provided that it complies with the following conditions:</p> <p>i. It should be in a clear .PDF/.IMG/.JPG/.TIFF/.GIF/.PNG format with the <u>password provided by their authorized representatives</u> to the</p>

	<p>members of the Bids and Awards Committee during the opening of eligibility proposal through video conferencing via Microsoft Teams. A certification that the documents are considered sealed pursuant to Section 25.9 of the 2016 Revised Implementing Rules and Regulations (IRR) of Republic Act 9184 shall be part of the Eligibility Proposal;</p> <p>ii. It is arranged accordingly based on the Eligibility Checklist using standard file name.</p> <p>iii. The documents should sent as raw file. Submission of documents through Google drive or similar application is not allowed.</p>
8.1	<p>The place of opening of eligibility documents is</p> <p>7th Floor, Tower 1 Double Dragon Plaza Double Dragon Meridian Park Macapagal Avenue corner Edsa Extension Bay Area Pasay City</p> <p><i>Contact Person:</i> Sunshine Rhina R. Caunin</p> <p>Head, BAC Secretariat</p> <p>249-5986 loc. 713 or 714</p> <p>tieza.bacsecretariat.gov.ph</p> <p>http://www.tieza.gov.ph</p> <p>Please email the following:</p> <p>For inquiries/concerns: <u>bacsecretariat@tieza.gov.ph</u></p> <p>For purchase of eligibility documents: <u>tieza.bacsecretariat@gmail.com</u></p> <p>For online submission: <u>tiezabac.online@gmail.com</u></p> <p>The date and time of opening of eligibility documents is 5 November 2020 at 10:00 A.M</p>
9.1	<i>Customer Satisfaction Survey Contracts</i>
9.2	<p><i>1. Set of Criteria</i></p> <p><i>Among others:</i></p> <p><i>1.1 Experience of the consultant – 50%</i></p> <p><i>1.2 Qualification of personnel to be assign – 30%</i></p>

	<p><i>1.3 Current work load in relations to capacity- 20 %</i></p> <p>2. Rating System</p> <p><i>2.1 Shortlisted consultant must obtain a score of 75% or higher</i></p>
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