PHILIPPINE BIDDING DOCUMENTS

Republic of the Philippines

Procurement of Consultancy Services for the Service Provider for the Individual and Household Focus Group Discussion for the Analysis of PCC Cases and Other Research Initiatives

First Edition

October 2025

Preface

These Philippine Bidding Documents (PBD) for the Government of the Philippines (GoP) for the procurement of Consulting Services through *[Competitive Bidding, Limited Source Bidding, Competitive Dialogue,*[1] *or Unsolicited Offer with Bid Matching*[2]*]* have been prepared by GoP for use by all branches, agencies, departments, bureaus, offices, or instrumentalities of the government, including government-owned and/or -controlled corporations (GOCC), government financial institutions (GFI), state universities and colleges (SUC), and local government units (LGU) and autonomous regional government[3] use in projects that are financed in whole or in part by the GoP or any foreign government/foreign or international financing institution in accordance with the provisions of the Implementing Rules and Regulations (IRR) of Republic Act (RA) No. 12009.

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

In order to simplify the preparation of the Bidding Documents for each procurement, the PBD group the provisions that are intended to be used unchanged in Section II. Short-Listing Documents of Part I; and **Error! Reference source not found.** (ITB) and **Error! Reference source not found.** (GCC) of Part II. Data and provisions specific to each procurement and contract should be included in Section III. Short-listing Data Sheet (SDS) of Part I, **Error! Reference source not found.** (BDS), and **Error! Reference source not found.** (SCC) of Part II. The forms to be used are provided in Section VII. PBD Related Forms.

Prudence must be exercised to check the relevance of the provisions of the PBD against the requirements of the specific Consulting Services to be procured. In addition, each section is prepared with notes intended only as information for the Procuring Entity or the person drafting the Bidding Documents. They shall not be included in the final documents, except for the notes introducing Section VII. PBD Related Forms where the information is useful for the Bidder. The following general directions should be observed when using the documents:

a) All the documents listed in the Table of Contents are normally required for the procurement of Consulting Services. However, they should be adapted as necessary to the circumstances of the particular Project.

b) These PBD are divided into Part I and Part II, which shall be both made available from the time the Request for Expression of Interest is first published until the deadline for the submission and receipt of bids.

c) Specific details, such as the “name of the Procuring Entity” and “address for bid submission,” should be furnished in the ITB, BDS, and SCC. The final documents should contain neither blank spaces nor options.

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[1] For Second Stage of Competitive Dialogue under Section 29.4.2 of IRR of RA No. 12009.

[2] For Comparative or Competitive Bidding for Unsolicited Offer under Section 30.7 of IRR of RA No. 12009.

[3] Unless the Treaty or International or Executive Agreement expressly provides use of foreign government/foreign or international financing institution procurement guidelines.

d) This Preface and the footnotes or notes in italics included in the Request for Expression of Interest, SDS, BDS, SCC, Terms of Reference, and Appendices are not part of the text of the final document, although they contain instructions that the Procuring Entity should strictly follow. The Bidding Documents should not contain footnotes except Section VII. Philippine Bidding Document since these provide important guidance to Bidders.

e) The criteria for evaluation and the various methods of evaluation in the ITB should be carefully reviewed. Only those that are selected to be used for the procurement in question should be retained and expanded, as required in the BDS. The criteria that are not applicable should be deleted from the BDS.

f) The cover page should be modified as required to identify the Bidding Documents and date of issue.

g) The Project Title page should be modified as required to identify the Project title and number, name, and address of the Procuring Entity.

h) If modifications must be made in bidding procedures, they can be presented in the BDS. Modifications for specific Project or Contract details should be provided in the SCC as amendments to the Conditions of Contract. For easy reference and completion, clauses from the SDS, BDS, or SCC shall appear in bold type face on Section II. Short-listing Documents of Part I, Section II. Instructions to Bidders, and Section IV. General Conditions of Contract of Part II, respectively.

PHILIPPINE COMPETITION COMMISSION
Ensuring businesses compete and consumers benefit

25/F Vertis North Corporate Center 1,
North Avenue, Quezon City 1105
www.phcc.gov.ph
queries@phcc.gov.ph
(+632) 8771 9722

Procurement of CONSULTING SERVICES

Procurement of Consultancy Services for the Service Provider for the Individual and Household Focus Group Discussion for the Analysis of PCC Cases and Other Research Initiatives

REI 2026-EPA-0010

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Glossary of Acronyms, Terms, and Abbreviations

ABC – Approved Budget for the Contract.

BAC – Bids and Awards Committee.

BIR – Bureau of Internal Revenue.

BSP – Bangko Sentral ng Pilipinas.

CDA - Cooperative Development Authority.

DOLE – Department of Labor and Employment.

GCC - General Conditions of Contract.

GFI – Government Financial Institution.

GOCC – Government-Owned and/or –Controlled Corporation.

GoP – Government of the Philippines.

GPPB – Government Procurement Policy Board.

HoPE – Head of Procuring Entity.

HRRB – Highest Rated Responsive Bid.

IRR – Implementing Rules and Regulations of Republic Act No. 12009.

ITB – Instructions to Bidders.

LGUs – Local Government Units.

LoC – Letter of Credit.

MYCA – Multi-Year Contracting Authority.

NGA – National Government Agency.

PhilGEPS - Philippine Government Electronic Procurement System.

Procuring Entity - the organization purchasing Consulting Services, as named in the SCC.

RA No. – Republic Act Number.

SCC - Special Conditions of Contract.

SEC – Securities and Exchange Commission.

UN – United Nations.

WB – World Bank.

Definition of Terms

Bid – a signed offer, proposal, or quotation submitted by a supplier, manufacturer, distributor, contractor, consultant, or service provider in response to the requirements of the Procuring Entity as stated in the Bidding Documents. (IRR of RA No. 12009, Section 5[c]).

Bidder – a supplier, manufacturer, distributor, contractor, consultant, and service provider, whether public or private, who submits a Bid in response to the requirements of the Procuring Entity as stated in the Bidding Documents. (IRR of RA No. 12009, Section 5[d]).

Bidding Documents – the documents issued by the Procuring Entity as the basis for Bids, furnishing all information necessary to prospective bidder to prepare a Bid for the Goods, Infrastructure Projects, and Consulting Services required by the Procuring Entity. (IRR of RA No. 12009, Section 5[e]).

Consultant - refers to a citizen, or any corporate body or commercial company duly organized and registered under the laws where it is established, habitually established in business and engaged in providing Consulting Services.

Consulting Services – refer to services for Infrastructure Projects and other types of projects or activities of the government requiring adequate external technical and professional expertise that are beyond the capability or capacity of the government to undertake such as, but not limited to: (i) advisory and review services; (ii) pre-investment or feasibility studies; (iii) design; (iv) construction supervision; (v) management and related services; and (vi) other technical services or special studies. (IRR of RA No. 12009, Section 5[i])

Contract – refers to the agreement entered into between the Procuring Entity and the Supplier or Manufacturer or Distributor or Service Provider for procurement of Goods and Services; Contractor for Procurement of Infrastructure Projects; or Consultant or Consulting Firm for Procurement of Consulting Services; as the case may be, as recorded in the Contract Form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.

Contract Price - the price payable to the Supplier under the Contract for the full and proper performance of its contractual obligations.

Effective Date of the Contract – the date indicated in the contract. However, the Consultant shall commence performance of its obligations only upon receipt of the Notice to Proceed.

Framework Agreement – is a procurement strategy which shall be in the nature of an option contract between the Procuring Entity and the bidder that stipulates the terms and conditions to be applied in subsequent contracts for the procurement of Goods, Infrastructure Projects, and Consulting Services with a single or multiple contractor, manufacturer, supplier, distributor, consultant, and service provider to expand the pool of prospective bidders, take advantage of economies of scale, minimize the administrative burden of conducting separate procurement activities, and generate time and money savings. (IRR, Sections 16.1 and 16.2).

Foreign-funded Procurement or Foreign-Assisted Project– refers to the acquisition of Goods, Consulting Services, and the contracting for Infrastructure Projects by the Government of the Philippines which are wholly or partly funded by foreign loans or grants pursuant to a Treaty or International or Executive Agreement.

Goods – refer to (i) all items, supplies, and materials, whether in the nature of equipment, furniture, stationery, materials for construction, or personal property of any kind, needed in the transaction of public businesses or in the pursuit of any government undertaking, project or activity; or (ii) general support services which pertain to all types of services except Consulting Services and Infrastructure Projects, such as the repair and maintenance of equipment and furniture, as well as trucking, hauling, janitorial, security, and related or analogous services. (IRR of RA No. 12009, Section 5[n])

Infrastructure Projects – include the construction, improvement, rehabilitation, demolition, repair, restoration, or maintenance of roads and bridges, railways, airports, seaports, communication facilities, civil works components of information technology projects, irrigation, flood control and drainage, water supply, sanitation, sewerage and solid waste management systems, shore protection, energy/power and electrification facilities, national buildings, school buildings, hospital buildings, and other related construction projects of the government. Also referred to as “civil works” or “works;” (IRR of RA No. 12009, Section 5[r])

Online submission – pertains to the submission of the short-listing documents and bids for Consulting Services through electronic means or through the e-bidding facility of the PhilGEPS.

Project – refers to a specific or identified procurement covering Goods, Infrastructure Projects or Consulting Services. A Procurement Project shall be described, detailed, and scheduled in the Project Procurement Management Plan prepared by the agency which shall be consolidated in the procuring entity's Annual Procurement Plan.

Supplier – refers to a citizen, or any corporate body or commercial company duly organized and registered under the laws where it is established, habitually established in business and engaged in the manufacture or sale of the merchandise or performance of the general services covered by his bid. Supplier as used in these Bidding Documents may likewise refer to a manufacturer, distributor, contractor, consultant, or service provider.

Verified Report – refers to the report submitted by the Implementing Unit to the HoPE setting forth its findings as to the existence of grounds or causes for termination and explicitly stating its recommendation for the issuance of a Notice to Terminate.

Part I

Section I. Request for Expression of Interest

PHILIPPINE COMPETITION COMMISSION
Ensuring businesses compete and consumers benefit

25/F Vertis North Corporate Center 1,
North Avenue, Quezon City 1105
www.phcc.gov.ph
queries@phcc.gov.ph
(+632) 8771 9722

REQUEST FOR EXPRESSION OF INTEREST FOR

Procurement of Consultancy Services for the Service Provider for the Individual and Household Focus Group Discussion for the Analysis of PCC Cases and Other Research Initiatives

1) The ***Philippine Competition Commission***, through the ***2026 National Expenditure Program (NEP)***[4] intends to apply the sum of ***One Million Pesos (PhP1,000,000.00)*** being the Approved Budget for the Contract (ABC) to payments under the contract for the ***Procurement of Consultancy Services for the Service Provider for the Individual and Household Focus Group Discussion for the Analysis of PCC Cases and Other Research Initiatives***. 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 short-listing documents for the ***r Individual and Household Focus Group Discussions for the Analysis of PCC Cases and Other Research Initiatives***[5] using the ***Early Procurement Activity***. Short-listing documents of interested consultants must be duly received by the Bids and Awards Committee (BAC) Secretariat on or before ***29 October 2025, 12:00 NN*** at ***25/F Vertis North Corporate Center 1, 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 from ***08:00 A.M. to 05:00 P.M., Monday*** *to* ***Friday.***

4) A complete set of Bidding Documents may be acquired by interested Bidders on ***21 October 2025*** from the given address below.

   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 short-listing documents, and have been determined as eligible in accordance with the provisions of Republic Act (RA) No. 12009, otherwise known as the "New Government Procurement Act", and its Implementing Rules and Regulations (IRR). The short-list shall consist of ***five (5) eligible bidders,*** which should not be fewer than three (3) but not more than seven (7) prospective bidders; in case of one (1) or less than the required number apply for eligibility and short-listing, pass the eligibility check, and/or the

[4] Ibid.

[5] A brief description of the terms of reference of the Consulting Service should be provided, including outputs/deliverables, location of project, and other information necessary to enable potential bidders to decide whether or not to respond to the invitation.

minimum score required in the short-listing, the BAC shall consider the same who will be entitled to submit bids manually or through online submission. The criteria and rating system for short-listing are:

CRITERIA	QUALIFICATIONS	BASES	WEIGHT (%)
Quality of personnel to be assigned to the project	Educational attainment of the Project Manager • Graduate of any bachelor's degree in any relevant field of social science, Communication, or Statistics • At least three (3) years of experience in handling Research and/or Project Management related to FGDs • At least sixteen (16) hours of relevant training Educational attainment of the Facilitator • Graduate of any bachelor's degree in any relevant field of Social Science, Communication, or Statistics • At least three (3) years of work experience in handling Research and/or Project Management related to FGDs • At least sixteen (16) hours of relevant training	Original signed curriculum vitae (CV) submitted indicating relevant work experience and educational background, and trainings attended supported by certificates of attendance / participation (Indicate in the CV the position the personnel are assigned to) *Note: Pursuant to Section 62.3 of the IRR, there should be no replacement of key personnel before the awarding of contract, except for any delay caused by the Procuring Entity, or for justifiable reason as may be determined by the BAC, such as, illness, death, or resignation; Provided, that it is duly supported by relevant certificates. Once the contract has been awarded, no replacement shall be allowed by the Head of Procuring Entity (HoPE) 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).*	**40%**

CRITERIA	QUALIFICATIONS	BASES	WEIGHT (%)
Experience and capability of the Service Provider the Project	• At least three (3) years in business • Has engaged with at least five (5) companies / institutions from the private sector in similar or relevant nature of work • Has engaged with at least two (2) institutions belonging to the public / government sector in similar or relevant nature of work as mentioned above • Has engaged in a project with at least equal to the ABC within the past three (3) years • Has an existing and up-to date database of qualified respondents.	DTI or SEC registration submitted indicating the year of registration and/or other relevant documents Originally signed copy of List of Ongoing and Completed Contracts within the last five (5) years indicating the contract amount, duration of the contract, activities undertaken, and nature/short profile or description (which can be annexed on the List of Ongoing and Completed Contracts) of engagement with copies of Certificates of Satisfactory Services Rendered or Certificates of Completion of at least one (1) private institution and two (2) government institutions. The records of previous engagement and quality of performance in projects that are related to competition and other similar fields, and geographical distribution of current/ impending projects.	**40%**

CRITERIA	QUALIFICATIONS	BASES	WEIGHT (%)
Overall Work commitment	• At most five (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 *Note: Contract/s that will terminate on or before ninety (90) calendar days from the deadline of submission of eligibility documents for this project, shall not be considered as 'ongoing'.*	**20%**
TOTAL			**100%**

All eligible bidders that will pass the score of **at least ninety (90) points** based on the criteria above shall be invited to offer their technical and financial proposals. Rating system for the shortlisting of prospective bidders is provided in Annex A for reference.

6) Bidding will be conducted through competitive selection using non-discretionary "pass/fail" criterion as specified in the Implementing Rules and Regulations (IRR) of RA No. 12009.

   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.

7) The Procuring Entity shall evaluate bids to determine the Highest Rated Bid using the ***Quality Based Evaluation/Selection (QBE/QBS)***. The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders.

8) Short-Listing Documents must be received by the Procuring Entity's BAC at the address indicated in the Request for Expression of Interest or through online submission on or before the date and time indicated in the **SDS.**

9) The contract shall be completed within January 1, 2026 to December 31, 2026.

10) All Bids must be accompanied by bid security in any of the acceptable forms and in the amount stated in **ITB** Clause 16.

11) The certification as to the current workload relative to capacity shall be made in accordance with the Instructions to Bidders in relation to TPF 5 therein.

12) Bid opening of the short-listing documents shall be on ***29 October 2025, 2:00 PM*** at ***9F Vertis North Corporate Center 1, North Avenue, Quezon City*** and/or ***via Microsoft Teams teleconference***. Bids will be opened in the presence of the Bidders' representatives who choose to attend the activity.

13) 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 70 of RA No. 12009 and its IRR, without thereby incurring any liability to the affected bidder or bidders.

14) For further information, please refer to:

The Secretariat
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 dbgavino@phcc.gov.ph
www.phcc.gov.ph

15) *You may visit the following websites:*

For downloading of Bidding Documents: https://www.phcc.gov.ph/procurement/request-for-quotation-proposal-expression-of-interest-invitation-to-bid

For online bid submission: https://www.phcc.gov.ph/procurement/e-bid-submission-system

20 October 2025

[redacted]

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

[redacted]

Section II. Short-Listing Documents

1) Short-listing 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 or 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%), **subject to the latest foreign investment negative list.** 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 Joint Venture Agreement (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 **SDS**.

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 **SDS**.

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 eligibility requirements or statements, the bids, and all other documents to be submitted to the BAC must be in English. The following eligibility requirements, together with the Short-listing 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 of this Section for purposes of determining eligibility of prospective bidders:

a) PhilGEPS Certificate of Registration (Platinum Membership) in accordance with Section 20 of the IRR.

b) Statement 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 procurement project, within the relevant period provided in the **SDS which shall not exceed ten (10) years.** The statement shall include, for each contract, the following:

i) the name and location of the contract;
ii) date of award of the contract;
iii) type and brief description of Consulting Services;
iv) consultant's role (whether main consultant, or partner in a JV)
v) amount of contract;
vi) contract duration; and
vii) certificate of satisfactory completion or equivalent specified in the **SDS** issued by the client, in the case of a completed contract.

c) 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.

d) [*If applicable*] the JVA in case the joint venture is already in existence, or in the absence of a JVA, a duly notarized statement from all the potential joint venture partners stating that they will enter into and abide by the provisions of the JVA in the event that the bid is successful.

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 or post, or the equivalent office having jurisdiction over the foreign bidder's affairs in the Philippines. However, for Contracting Parties to the Apostille Convention, the documents shall be authenticated through an apostille by the Competent Authority, as defined in Section 20.9.2 of the IRR, except for countries identified by the Department of Foreign Affairs (DFA) that will still require legalization (red ribbon) by the relevant Embassy or Consulate.

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. Foreign Consultants shall seek the participation of Filipino Consultants by entering into a JV with Filipino Consultants.

2.4 To facilitate the determination of eligibility, the BAC shall use the contents of the PhilGEPS electronic registry of manufacturers, suppliers, distributors, contractors, or consultants, in accordance with Section 20 of the IRR.

3) **Format and Signing of Short-listing Documents**

3.1 Prospective bidders shall submit their short-listing documents through their duly authorized representative on or before the deadline specified in Clause 5 of this Section.

3.2 The Short-listing 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 short-listing documents.

3.3 Any insertions, 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 Short-listing Documents**

4.1 Prospective bidders shall enclose their short-listing documents described in Clause 2.1, in a sealed envelope marked "SHORT-LISTING DOCUMENTS."

4.2 The short-listing documents as indicated in the **SDS** shall be signed by the prospective bidder or its duly authorized representative/s.

4.3 All envelopes shall:

a) contain the name of the contract to be bid in capital letters;
b) bear the name and address of the prospective bidder in capital letters;
c) be addressed to the Procuring Entity's BAC specified in the **SDS**;
d) bear the specific identification of this Project indicated in the **SDS**; and
e) bear a warning "DO NOT OPEN BEFORE…" the date and time for the opening of short-listing documents, in accordance with Clause 5.

4.4 Unsealed or unmarked envelopes or short-listing documents that cannot be opened or corrupted in case of online submission, as required in the Bidding Documents, shall be rejected. However, for manually submitted envelopes that are not properly sealed and marked as required in the Bidding Documents, the same shall be accepted; Provided, that the bidder or its duly authorized representative shall acknowledge such condition of the documents as submitted. The BAC shall assume no responsibility for misplacement of the contents of the short-listing documents, or for its premature opening.

5) **Deadline for Submission of Short-listing Documents**

Short-listing documents must be received by the Procuring Entity's BAC at the address indicated in the Request for Expression of Interest or through online submission on or before the date and time indicated in the **SDS.**

6) **Late Submission of Short-listing Documents**

Any short-listing documents submitted after the deadline for submission and receipt prescribed in Clause 5 of this Section 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 short-listing documents, the Bidder's name, its representative and the time the short-listing documents were submitted late.

7) **Modification and Withdrawal of Short-listing Documents**

7.1 The prospective bidder may modify its short-listing documents before the deadline for the submission and receipt of short-listing documents. For manual submission and receipt of short-listing documents, the prospective bidder shall not be allowed to retrieve its short-listing documents but shall be allowed to submit the modification to the short-listing documents equally sealed, properly identified, linked to its bid marked as "SHORT-LISTING 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. For online submission, where bidders modify their short-listing documents, they shall not be allowed to retrieve their short-

listing documents but shall only be allowed to submit the short-listing modification equally secured and properly identified, and it shall be labelled as a "modification" of the one previously submitted. The time indicated in the latest short-listing receipt page generated shall be the official time of submission. Short-listing documents submitted after the deadline shall not be accepted.

7.2 A prospective bidder may, in writing, withdraw its short-listing documents before the deadline for the submission and receipt of short-listing documents.

7.3 Short-listing 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 short-listing documents shall not be permitted to submit another set, directly or indirectly, for the same project. A prospective bidder that acquired the short-listing 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 short-listing documents.

8) Opening and Preliminary Examination of Short-listing Documents

8.1 The BAC will open the envelopes containing the short-listing 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 **SDS**. The prospective bidders' representatives who are present shall sign a register evidencing their attendance.

8.2 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 on the PhilGEPS website and the website of the Procuring Entity concerned.

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

8.4 The short-listing documents envelopes and modifications, if any, shall be opened one at a time, and the following read out and recorded:

a) the name of the prospective bidder;
b) whether there is a modification or substitution; and
c) the presence or absence of each document comprising the short-listing documents vis-à-vis a check of the required documents.

8.5 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 short-listing document required, it 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, it shall be considered eligible to participate in the bidding, and the BAC shall mark the set of short-listing 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 short-listing 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 **SDS** 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 **SDS**.

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

Decisions of the Procuring Entity at any stage of the procurement process may be protested to the HoPE; Provided, That a prior request for reconsideration should have been filed by the party concerned to the BAC and the same has been resolved.

Section III. Short-listing Data Sheet

Short-listing Data Sheet

<table>
<tr><th>Short-listing Documents</th><th></th></tr>
<tr><td>1.2</td><td>Market Research, Survey Research
Management and Related Services</td></tr>
<tr><td>1.3</td><td>No further instructions.</td></tr>
<tr><td>2.1 (b)</td><td>The statement of all ongoing and completed government and private contracts shall include all such contracts within five (5) years prior to the deadline for the submission and receipt of short-listing documents.</td></tr>
<tr><td>2.1 (b) (vii)</td><td>Copies of Certificates of Satisfactory Service Rendered / Certificates of Completion from previous engagement and projects related to the contract to be bid</td></tr>
<tr><td>4.2</td><td>Please refer to Section II.2 – Eligibility Requirements of the Short-listing Documents</td></tr>
<tr><td>4.3 (c)</td><td>The PCC 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
www.phcc.gov.ph</td></tr>
<tr><td>4.3 (d)</td><td>The Project title is Procurement of Consultancy Services for the Service Provider for the Individual and Household Focus Group Discussion for the Analysis of PCC Cases and Other Research Initiatives

The identification number of the Contract is (REI No.) REI 2026-EPA-0010</td></tr>
<tr><td>5</td><td>The address for submission of short-listing documents is:

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
<u>www.phcc.gov.ph</u> or via e-bid submission:
<u>https://www.phcc.gov.ph/procurement/e-bid-submission-system</u>

The deadline for submission of short-listing documents is: 29 October 2025, 12:00 NN</td></tr>
<tr><td>8.1</td><td>The place of opening of short-listing documents is:
9F Tower 1, Vertis North Corporate Center North Avenue Quezon City

The date and time of opening of short-listing documents is: 29 October 2025, 2:00 PM</td></tr>
<tr><td>9.1</td><td>Similar contracts shall refer to: market research, survey research, or related consulting services (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)</td></tr>
<tr><td>9.2</td><td>
<table>
<tr><th>CRITERIA</th><th>QUALIFICATIONS</th><th>BASES</th><th>WEIGHT (%)</th></tr>
<tr><td>Quality of personnel</td><td></td><td></td><td>40%</td></tr>
</table>
</td></tr>
</table>

		to be assigned to the project	Educational attainment of the Project Manager • Graduate of any bachelor's degree in any relevant field of social science, Communication, or Statistics • At least three (3) years of experience in handling Research and/or Project Management related to FGDs • At least sixteen (16) hours of relevant training Educational attainment of the Facilitator • Graduate of any bachelor's degree in any relevant field of Social Science, Communication, or Statistics • At least three (3) years of work experience in handling Research and/or Project Management related to FGDs • At least sixteen (16) hours of relevant training	Original signed curriculum vitae (CV) submitted indicating relevant work experience and educational background, and trainings attended supported by certificates of attendance / participation (Indicate in the CV the position the personnel are assigned to) *Note: Pursuant to Section 62.3 of the IRR, there should be no replacement of key personnel before the awarding of contract, except for any delay caused by the Procuring Entity, or for justifiable reason as may be determined by the BAC, such as, illness, death, or resignation;* *Provided, that it is duly supported by relevant certificates. Once the contract has been awarded, no replacement shall be allowed by the Head of Procuring Entity (HoPE) 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).*	
		Experience and capability of the	• At least three (3) years in business	DTI or SEC registration submitted indicating	**40%**

		Service Provider th e Project	• Has engaged with at least five (5) companies / institutions from the private sector in similar or relevant nature of work • Has engaged with at least two (2) institutions belonging to the public / government sector in similar or relevant nature of work as mentioned above • Has engaged in a project with at least equal to the ABC within the past three (3) years • Has an existing and up-to date database of qualified respondents.	the year of registration and/or other relevant documents Originally signed copy of List of Ongoing and Completed Contracts within the last five (5) years indicating the contract amount, duration of the contract, activities undertaken, and nature/short profile or description (which can be annexed on the List of Ongoing and Completed Contracts) of engagement with copies of Certificates of Satisfactory Services Rendered or Certificates of Completion of at least one (1) private institution and two (2) government institutions. The records of previous engagement and quality of performance in projects that related to competition and other similar fields, and geographical distribution of current/ impending projects.	
		Overall Work commitment	• At most five (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 *Note: Contract/s that will terminate on or before ninety (90)*	**20%**

				calendar days from the deadline of submission of eligibility documents for this project, shall not be considered as 'ongoing'.	
		TOTAL			**100%**

Section VII. Philippine Bidding Document Related Forms

Short-listing Documents Submission Form..... 28

SHORT-LISTING DOCUMENTS SUBMISSION FORM

[Date]

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

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

In line with this submission, we certify that:

a) *[Name of Consultant*] is not blacklisted or barred from bidding by the GoP or any of its agencies, offices, corporations, LGUs, or autonomous regional government, including foreign government or foreign or international financing institution; and

b) Each of the documents submitted herewith is an authentic copy of the original, complete, and all statements and information provided therein are true and correct.

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

We further acknowledge that failure to sign this Short-listing Documents Submission Form shall be a ground for our disqualification.

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

Republic of the Philippines
gppb
Government Procurement Policy Board

PHILIPPINE COMPETITION COMMISSION
Ensuring businesses compete and consumers benefit

25/F Vertis North Corporate Center 1
North Avenue, Quezon City 1105
www.phcc.gov.ph
queries@phcc.gov.ph
(+632) 8771 9722

TERMS OF REFERENCE

Procurement of Service Provider for Individual and Household Focus Group Discussions for the Analysis of 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 (M&A), investigating and adjudicating anti-competitive agreements and abuses of dominant position, and undertaking economic and policy research on competition-related matters.

In case analysis, lawyers and economists assess whether certain agreements or conduct undertaken by firms or proposed M&As are likely to substantially prevent, restrict, or lessen competition in the relevant market, as well as consider any efficiencies which are likely to arise from the transaction. In economic policy research, economists and lawyers also need to gather insights from stakeholders, particularly on the effects of new and existing regulations on their consumption patterns and individual compliance.

During these assessments, study teams considers the broad range of possible factual contexts and the specific competitive effects that may arise in different transactions, such as the structure of the relevant markets, the market position of the entities, the actual or potential competition from entities within or outside of the relevant market, the alternatives available to suppliers and users, and their access to supplies or markets, and any legal or other barriers to entry.

Given the foregoing, focus group discussions (FGDs) among selected respondents pertinent to the case or research can streamline data gathering and facts verification.

II. Objectives

This Terms of Reference (TOR) for the engagement will facilitate data gathering and facts verification among informants pertinent to PCC cases or research activities. 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.

III. Scope of Work

All FGDs under the engagement shall be governed by Task Orders to be issued by PCC. The service provider shall undertake up to four (4) task orders during the period of **January 01, 2026 to December 31, 2026.** The conduct of FGDs shall only

commence upon the issuance of Task Orders by the PCC.

Based on each Task Order issued by PCC, the Service Provider shall:

1. Conduct at least four (4) FGDs and each FGD shall have at least seven (7) participants;
2. Identify the participants in the FGD based on the selection criteria to be provided by PCC for a specific case or research initiative;
3. Arrange the logistics for each FGD in consultation with the PCC;
4. Conduct the FGDs based on the list of topics, issues, and questions provided by the PCC;
5. Provide a facilitator who will introduce the topics, pose the questions, and guide the discussion so that all questions are covered within the allotted time;
6. Document participant responses during the FGD;
7. Write a report that summarizes the FGD proceedings; and
8. Transcribe the FGD.

IV. Responsibilities of the End-user

The Economics Office, as End-user shall assume the following obligations:

1. Provide the Service Provider a directive to facilitate the execution of the FGD;
2. Constantly coordinate with the Service Provider on the planning and implementation of the FGD;
3. Conduct initial consultation with the Service Provider prior the issuance of a Task Order;
4. Review/approve project outputs/deliverables by Service Provider;
5. Issue a Certificate of Satisfactory Services Rendered for every completed Task Order; and
6. Endorse payments to the Service Provider only upon PCC's review and acceptance of the required deliverables.

V. Approved Budget for the Contract and Mode of Procurement

The Approved Budget for the Contract (ABC) is **One Million Pesos Only (PhP 1,000,000.00)** inclusive of all applicable government taxes, and shall include all remunerations, costs or profits arising from or in relation to the services rendered and/or in preparation for this engagement, such as the conduct of up to four (4) task orders. Each task order shall have at least four (4) FGDs and each FGD shall have at least seven (7) participants. The budget shall cover the remuneration of the Service Provider and the costs of conducting FGDs.

The mode of procurement shall be **Competitive Bidding** as provided under the Implementing Rules and Regulations (IRR) of the Republic Act (R.A.) No. 12009, otherwise known as the New Government Procurement Act (NGPA).

VI. Timelines, Deliverables, Schedule, and Mode of Payment

The Contract shall commence immediately upon issuance of the Notice to Proceed to the Service Provider, provided that it shall not commence earlier than January 1, 2026, and shall remain in effect until **December 31, 2026**. All task orders shall be issued and fully completed within this period, including the conduct of FGDs and submission of the corresponding deliverables in accordance with the prescribed timeline.

The Service Provider must be able to conduct FGDs for simultaneous cases if necessary. By default, FGDs shall be conducted face-to-face or in-person. In exceptional and unforeseen circumstances, including but not limited to typhoons and suspension of onsite work, alternative means of communication, such as video conferencing, may be utilized, subject to the End-user's approval.

Each Task Order is to be completed within sixty calendar (60) days – with thirty (30) calendar days for Preparatory work; twenty (20) calendar days for Conduct of actual FGDs; and ten (10) calendar days for Submission of final report and transcript.

For each Task Order, the Service Provider shall provide its proposed implementation schedule indicating the specific activities and corresponding outputs using a Gantt Chart. The PCC and the Service Provider may agree to extend the 60-day timeline and/or decrease or increase the number of FGD participants, if necessary. Any extension to the 60-day timeline and/or changes to the initially recommended number of respondents will be specified in the Task Order. Further, these changes shall not bear any additional costs to the PCC or its End-user.

Below is the summary of the deadline for submissions for each Task Order:

Milestones	Timeline	Deliverables	% of Contract Amount per Task Order
Preparatory work (submission of list of participants and their information, proposed groupings, arrangement of logistics)	Within thirty (30) calendar days from the receipt of the Service Provider of the Task Order	Submission of list of participants and their information, proposed groupings, arrangement of logistics	30%
Conduct of the actual FGDs	Within twenty (20) calendar days after preparatory work has concluded	Recordings and photos of FGDs conducted	30%

Submission of final report and transcript	Within ten (10) calendar days upon completion of the actual FGD	Final report and transcript	40%
TOTAL	Completion of FGD **within sixty (60) 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 sixty (60) days and/or changes to the recommended number of FGD participants, the adjusted submission dates and information will also be reflected in the Task Order. During the initial consultation with the PCC, if the Service Provider assesses whether the conduct of an FGD is difficult or impossible, it may conduct In-Depth Interviews (IDIs) as an alternative, subject to prior approval of the PCC. For this purpose, one (1) FGD shall be considered equivalent to ten (10) individual IDIs.

The timeline for the FGDs shall begin when the Service Provider 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 by the Project Manager or the highest officer/personnel in-charge of the Service Provider.

All payments shall be endorsed by the End-user supported by the originally signed statement of account or billing invoice, the issuance of a Certificate of Satisfactory Service Rendered for the deliverables for each task order, and each tranche payment to the Service Provider shall be released upon End-user's review and acceptance of the deliverables above. All payments shall be released and claimed within the PCC premises, or may be credited to the Service Provider's bank account, net of applicable transfer charges.

VII. Institutional Arrangement

The Service Provider shall be engaged by the PCC and shall submit outputs directly to the Economics Office Director or a designated representative of the End-user within PCC for review and endorsement for payment. The Service Provider should also submit a soft copy of all project files on **or before December 31, 2026**. Date of submission shall be the date when the PCC receives all the printed documents or the soft copies of all the project files, whichever may come first.

VIII. Qualifications of the Service Provider and its Personnel

The Service Provider should meet all the requirements set by the NGPA and its IRR to be eligible to bid.

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 Philippine Bidding Documents (PBD), and other relevant documents necessary for evaluation as identified in this TOR and other relevant provisions of the NGPA and its IRR should be submitted and be present upon opening of the bids.

Further, the following are the minimum qualifications required for this Project and shall be evaluated based on the documents submitted by the bidder:

CRITERIA	QUALIFICATIONS	BASES	WEIGHT (%)
Quality of personnel to be assigned to the project	Educational attainment of the Project Manager • Graduate of any bachelor's degree in any relevant field of social science, Communication, or Statistics • At least three (3) years of experience in handling Research and/or Project Management related to FGDs • At least sixteen (16) hours of relevant training Educational attainment of the Facilitator • Graduate of any bachelor's degree in any relevant field of Social Science, Communication, or Statistics • At least three (3) years of work experience in handling Research and/or Project Management related to FGDs • At least sixteen (16) hours	Original signed curriculum vitae (CV) submitted indicating relevant work experience and educational background, and trainings attended supported by certificates of attendance / participation (Indicate in the CV the position the personnel are assigned to) *Note: Pursuant to Section 62.3 of the IRR, there should be no replacement of key personnel before the awarding of contract, except for any delay caused by the Procuring Entity, or for justifiable reason as may be determined by the BAC, such as, illness, death, or resignation; Provided, that it is duly supported by relevant certificates. Once the contract has been awarded, no replacement shall be allowed by the Head of Procuring Entity (HoPE) until after fifty percent*	40%

CRITERIA	QUALIFICATIONS	BASES	WEIGHT (%)
	of relevant training	*(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).*	
Experience and capability of the Service Provider	• At least three (3) years in business • Has engaged with at least five (5) companies / institutions from the private sector in similar or relevant nature of work • Has engaged with at least two (2) institutions belonging to the public / government sector in similar or relevant nature of work as mentioned above • Has engaged in a project with at least equal to the ABC within the past three (3) years • Has an existing and up-to-date database of qualified respondents.	DTI or SEC registration submitted indicating the year of registration and/or other relevant documents Originally signed copy of List of Ongoing and Completed Contracts within the last five (5) years indicating the contract amount, duration of the contract, activities undertaken, and nature/short profile or description (which can be annexed on the List of Ongoing and Completed Contracts) of engagement with copies of Certificates of Satisfactory Services Rendered or Certificates of Completion of at least one (1) private institution and two (2) government institutions. The records of previous engagement and quality of performance in projects that related to competition and other similar fields, and geographical distribution of current/ impending projects.	40%

CRITERIA	QUALIFICATIONS	BASES	WEIGHT (%)
Overall work commitment	• At most five (5) ongoing projects (including awarded but not yet started contracts)	Originally signed records of ongoing (including awarded but not yet started contracts) and previous engagements *Note: Contract/s that will terminate on or before ninety (90) calendar days from the deadline of submission of eligibility documents for this project, shall not be considered as 'ongoing'.*	20%
TOTAL			**100%**

All eligible bidders that will pass the score of **at least ninety (90) points** based on the criteria above shall be invited to offer their technical and financial proposals.

IX. Selection Criteria

The technical proposal of the shortlisted bidders will be evaluated using the Quality Based Evaluation (QBE), pursuant to the pertinent provisions of the NGPA and its IRR.

CRITERIA	BASES	WEIGHT (%)
Experience and capability of the Service Provider (25%)	As specified in Section VIII. (Qualifications of the Service Provider and its Personnel)	**100%**
Quality of personnel to be assigned to the project (20%)		
Plan of approach and methodology (50%)	Timeliness, clarity, feasibility of the written proposal, and overall quality of proposed work	
Overall work commitment (5%)	Originally signed records of on-going (including awarded but not yet started contracts) and previous engagements *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'.*	
TOTAL RATING		**100%**

The shortlisted bidder with the highest rated score based on the technical proposal submitted, provided that the score shall pass the hurdle rate of **ninety (90) points**, and that all eligibility, legal, technical, financial and other relevant documents for the procurement of this engagement are valid, compliant and responsive in reference to the requirements of NGPA and its IRR shall be declared as the **Highest Rated and Responsive Bidder**.

X. Information Security Management System

To ensure the Philippine Competition Commission (PCC) maintains a high standard of information security when engaging with third-party providers, all suppliers are required to comply with the established PCC Information Security Management System (ISMS). These requirements are outlined in the Supplier Security Policy (POL-PCC-GSD 02-03) and related ISMS policies and procedures.

All data, documents, records, configuration files, and metadata (collectively referred to as "Information") provided to the supplier(s) for the purpose of delivering services are considered confidential and remain the exclusive property of PCC. The supplier(s) shall recognize the critical importance of maintaining the security and confidentiality of the Information and agree to prevent its unauthorized transfer, disclosure, or use by any third party. The supplier(s) shall not use the Information for any purpose other than to perform the agreed-upon services. Furthermore, the supplier(s) shall ensure that, upon completion of the service, they will not retain any portion of the Information in any form whatsoever.

The following must be submitted after the issuance of Notice of Award or Purchase Order or Job Order:

- Notarized Non-Disclosure Agreement
- Notarized Data Sharing Agreement (if applicable)
- Project Risk Management Plan (if applicable)

The documents will be submitted to the ISMS Secretariat in compliance with the approved PCC Information Security Management System and will not form part of the submission for payment processing.

XI. Liquidated Damages

If the Service Provider 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 Contract 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.

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

Prepared by:

[redacted]

DAVID PAUL C. ARZADON
Competition Policy
Research Officer I

Approved by:

[redacted]

CARLOS L. VEGA
Acting Director IV

CONFORME:

_____

Name and Signature of Authorized Representative

_____

Designation

_____

Name of Company

_____

Date

ANNEX A

RATING CRITERIA FOR SHORTLISTING ELIGIBLE BIDDER/S PROPOSAL

CRITERIA	QUALIFICATIONS	PARAMETERS		WEIGHT (%)
Quality of personnel to be assigned to the project (40%)	Educational attainment[1] of the Project Manager	100	With PhD or Doctorate degree relevant to the field.	15%
		90	With Master of Sciences/Arts degree relevant to the field.	
		85	With Bachelor of Sciences/Arts degree relevant to the field.	
		0	Educational attainment below a Bachelor of Sciences/Arts degree, or degree attained is not relevant to the field or other allied courses.	
	Educational attainment[2] of the Facilitator	100	With PhD or Doctorate degree relevant to the field.	15%
		90	With Master of Sciences/Arts degree relevant to the field.	
		85	With Bachelor of Sciences/Arts degree relevant to the field.	
		0	Educational attainment below a Bachelor of Sciences/Arts degree, or degree attained is not relevant to the field or other allied courses.	
	Work experience of the Project Manager	100	With more than six (6) years of work experience in handling Research and/or Project Management related to FGDs.	30%
		90	With at least four (4) years of work experience in handling Research and/or Project Management related to FGDs.	
		85	With at least three (3) years of work experience in handling Research and/or Project Management related to FGDs.	
		0	With less than three (3) years of work experience in handling Research and/or Project Management related to FGDs.	
	Work experience of the Facilitator	100	With more than six (6) years of work experience in socioeconomic household survey design and implementation	30%
		90	With at least four (4) years of work experience in handling Research and/or Project Management related to FGDs.	

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

[2] Preferably in any of the following: Psychology, Public Administration / Management, Social Science, Communication, Statistics or other allied courses

CRITERIA	QUALIFICATIONS	PARAMETERS		WEIGHT (%)
		85	With at least three (3) years of work experience in handling Research and/or Project Management related to FGDs.	
		0	With less than three (3) years of work experience in handling Research and/or Project Management related to FGDs.	
	Number of hours of relevant training[3] of all personnel	100	With more than thirty-two (32) hours of relevant training	10%
		90	At least seventeen (17) hours of relevant training	
		85	At least sixteen (16) hours of relevant training	
		0	With less than sixteen (16) hours of relevant training	
Applicable experience of the firm (40%)	Number of years in operations/existence	100	In the business for more than six (6) years	40%
		90	Four (4) years or more in business	
		85	Three (3) years or more in business	
		0	With less than three (3) years in business	
	Number of private organizations engaged as specified in the TOR	100	Engaged with more than eight (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 at least six (6) 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 five (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)	

[3] Relevant training in project management survey design and sampling, statistical computing, data manipulation, and other related trainings

CRITERIA	QUALIFICATIONS	PARAMETERS		WEIGHT (%)
		0	Engagements with less than five (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), or at least one project rated below "Above Satisfactory"	
	Number of government organizations engaged as specified in the TOR	100	Engaged with more than five (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, comprehensive, and up-to-date database of qualified respondents	10%
		85	There is an existing, adequate, and up-to-date database of qualified respondents	
		0	No existing up-to-date database, or insufficient database of qualified respondents	
Current work-load relative to capacity (20%)	Current workload relative to capacity (including awarded but not yet started contracts)	100	With less than two (2) market research projects	100%
		90	With two (2) to four (4) market research projects	
		85	With five (5) market research projects	
		0	With more than five (5) market research projects	

ANNEX B

RATING CRITERIA FOR EVALUATION OF THE TECHNICAL PROPOSAL

CRITERIA	QUALIFICATIONS	PARAMETERS		WEIGHT (%)
Experience and capability of the Service Provider (25%)	Number of years in operations/existence	100	In operation as a survey firm for more than three (3) years	32%
		85	In operation as a survey firm for at least three (3) years	
		0	In operation as a survey firm for less than three (3) years	
	Number of private organizations engaged, as specified in the TOR	100	Has engaged with more than five (5) private companies / institutions	28%
		85	Has engaged with five (5) private companies / institutions	
		0	Has engaged with less than five (5) private companies/institutions	
	Number of government organizations engaged as specified in the TOR	100	Has engaged with more than two (2) organizations belonging to the public sector in similar or relevant nature of work as mentioned above	20%
		85	Has engaged with two (2) organizations belonging to the public sector in similar or relevant nature of work as mentioned above	
		0	Has engaged with less than two (2) organizations belonging to the public sector in similar or relevant nature of work as mentioned above	
	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	
Quality of personnel to be assigned to the project (20%)	Educational attainment of the **Project Manager**	100	PhD holder in any relevant field of Social Science, Communication, and/or Statistics	15%
		90	MS/MA holder in any relevant field of Social Science, Communication, and/or Statistics	
		85	BS/BA holder in any relevant field of Social Science, Communication, and/or Statistics	
		0	No degree	
	Number of hours of relevant training of the **Project Manager**	100	With more than sixteen (16) hours of relevant training	15%
		85	With at least sixteen (16) hours of relevant training	

CRITERIA	QUALIFICATIONS	PARAMETERS		WEIGHT (%)
		0	With less than sixteen (16) hours of relevant training	
	Work experience of the **Project Manager**	100	With more than three (3) years of work experience in handling Research and/or Project Management related to FGDs	20%
		85	With at least three (3) years of work experience in handling Research and/or Project Management related to FGDs	
		0	With less than three (3) years of work experience in handling Research and/or Project Management related to FGDs	
	Educational attainment of the **Facilitator**	100	PhD holder in any relevant field of Social Science, Communication, and/or Statistics	15%
		90	MS/MA holder in any relevant field of Social Science, Communication, and/or Statistics	
		85	BS/BA holder in any relevant field of Social Science, Communication, and/or Statistics	
		0	No degree	
	Number of hours of relevant training of the **Facilitator**	100	With more than sixteen (16) hours of relevant training	15%
		85	With sixteen (16) hours of relevant training	
		0	With less than sixteen (16) hours of relevant training	
	Work experience of the **Facilitator**	100	With more than three (3) years of experience in handling Research and/or Project Management related to FGDs	20%
		85	With at least three (3) years of work experience in handling Research and/or Project Management related to FGDs	
		0	With less than three (3) years of work experience in handling Research and/or Project Management related to FGDs	
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	

CRITERIA	QUALIFICATIONS	PARAMETERS		WEIGHT (%)
		0	**Poor** The proposal indicates late submission of the required deliverables	
	Comprehensiveness of FGD/KII/IDI plan	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.	20%
		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 are 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** The sampling design submitted is compliant with the requirements in the TOR.	25%
		85	**Good** The sampling design submitted has identified deviation from the requirements in the TOR, but the FGD can still be conducted with acceptable results.	
		0	**Poor** The sampling design is discussed generically, and the specific information are not tailored to the assignment, thus, it is deemed that the FGD cannot be conducted with acceptable results.	

CRITERIA	QUALIFICATIONS	PARAMETERS		WEIGHT (%)
	Quality control measures to be used during data collection, data entry and data cleaning; interviews will be computer/tablet assisted	100	**Very Good** Quality control measures submitted are carefully designed and compliant with the requirements in the TOR.	25%
		85	**Good** Quality control measures submitted have identified deviation from the requirements in the Terms of Reference, but the FGD 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 FGD cannot be conducted with acceptable results.	
	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.	10%
		0	Non-submission of existing policies of the firm pertaining to the following: refusal rate, minimum no. of callbacks and attrition rate, if any	
Overall work commitment (5%)	Number of ongoing projects (including awarded by not yet started contracts)	100	Less than five (5) ongoing projects	100%
		85	Five (5) ongoing projects	
		0	More than five (5) ongoing projects	