

# **PHILIPPINE BIDDING DOCUMENTS**

## **Procurement of CONSULTING SERVICES**

**Government of the Republic of the Philippines**

***CONSULTANCY SERVICES FOR THE QUEZON CITY CONSUMER AND  
BUSINESS PROFILING FOR QC COMMERCE HUBS PROGRAM (KOMERSYO  
KYUSI)***

***Project No.: CONSUL-22-005***

***Approved Budget for the Contract:***

***Two Million Nine Hundred Ninety-Five Thousand Pesos (Php 2,995,000.00)***

**Fifth Edition  
August 2016**

# Preface

These Philippine Bidding Documents (PBDs) for the procurement of Consulting Services through Competitive Bidding have been prepared by the Government of the Philippines (GoP) for use by all branches, agencies, departments, bureaus, offices, or instrumentalities of the Government, including government-owned and/or -controlled corporations (GOCCs), government financial institutions (GFIs), state universities and colleges (SUCs), local government units (LGUs), and autonomous regional government. The procedures and practices presented in this document have been developed through broad experience, and are for mandatory use in projects that are financed in whole or in part by the GoP or the World Bank or any foreign government/foreign or international financing institution in accordance with the provisions of the 2016 Revised Implementing Rules and Regulations (IRR) of Republic Act 9184 (R.A. 9184).

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 minimum eligibility requirements of bidders, such as track record to be determined by the Head of the Procuring Entity; (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 PBDs groups the provisions that are intended to be used unchanged in Section II. Eligibility 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. Eligibility Data Sheet (EDS) 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 the attachments.

Care should be taken to check the relevance of the provisions of the Bidding Documents against the requirements of the specific Consulting Services to be procured. 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 PBDs 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 advertised/posted until the deadline for the submission and receipt of bids
- (c) Specific details, such as the “name of the Procuring Entity” and “address for proposal submission,” should be furnished in the EDS, BDS, and SCC. The final documents should contain neither blank spaces nor options.
- (d) This Preface and the footnotes or notes in italics included in the Request for Expression of Interest, EDS, 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 contain no footnotes except **Error! Reference source not found.** of Part II 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 should be modified as required to identify the Bidding Documents as to the names of the Project, Contract, and Procuring Entity, in addition to date of issue.
- (g) If modifications must be made to bidding procedures, they can be presented in the BDS. Modifications for specific Project or Contract should be provided in the SCC as amendments to the Conditions of Contract. For easy completion, whenever reference has to be made to specific clauses in the EDS, BDS, or SCC these terms shall be printed in bold type face on Section II. Eligibility Documents, Section I. Instructions to Bidders, and Section III. General Conditions of Contract, respectively.

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# ***Section I. Request for Expression of Interest***

## **Notes on Request for Expression of Interest**

The Request for Expression of Interest provides information that enables potential Bidders to decide whether to participate in the procurement at hand. The Request for Expression of Interest shall be:

- (a) Posted continuously in the Philippine Government Electronic Procurement System (PhilGEPS) website and the website of the Procuring Entity concerned, if available, and the website prescribed by the foreign government/foreign or international financing institution, if applicable, seven (7) calendar days starting on the date of advertisement; and
- (b) Posted at any conspicuous place reserved for this purpose in the premises of the Procuring Entity concerned for seven (7) calendar days, as certified by the head of the Bids and Awards Committee (BAC) Secretariat of the Procuring Entity concerned.
- (c) Advertised at least once in a newspaper of general nationwide circulation which has been regularly published for at least two (2) years before the date of issue of the advertisement, subject to Sections 21.2.1(c) of the IRR of R.A. 9184<sup>1</sup>;

Apart from the essential items listed in the Bidding Documents, the Request for Expression of Interest should also indicate the following:

- (a) The date of availability of the Bidding Documents, the place where it may be secured and the deadline for submission of the Expression of Interest (EOI) together with the application for eligibility;
- (b) The set of criteria and rating system for short listing of prospective bidders to be used for the particular contract to be Bid, which shall consider the following, among others:
  - (i) Applicable experience of the consultant and members in case of joint ventures, considering both the overall experiences of the firms or, in the case of new firms, the individual experiences of the principal and key staff, including the times when employed by other consultants;
  - (ii) Qualification of personnel who may be assigned to the job vis-à-vis extent and complexity of the undertaking; and
  - (iii) Current workload relative to capacity;

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<sup>1</sup> Two years after effectivity of the 2016 Revised IRR of RA 9184 on **28 October 2016**, advertisement in a newspaper of general nationwide circulation shall no longer be required. However, a Procuring Entity that cannot post its opportunities in the PhilGEPS for justifiable reasons shall continue to publish its advertisements in a newspaper of general nationwide circulation.

- (c) The number of consultants to be short listed and the procedure to be used in the evaluation of Bids of short listed consultants, *i.e.*, QBE or QCBE; and if QCBE, the weights to be allocated for Technical and Financial Proposals; and
- (d) The contract duration.

In the case of WB funded projects, the Request for Expression of Interest shall be sent to all who have expressed an interest in undertaking the services as a result of any General Procurement Notice issued. In addition, it shall also be sent to all heads of associations of consultants within the area where the project will be undertaken.



REPUBLIC OF THE PHILIPPINES  
QUEZON CITY GOVERNMENT



**BIDS AND AWARDS COMMITTEE FOR INFRASTRUCTURE & CONSULTANCY**

2<sup>nd</sup> floor, Finance Building, Procurement Department, Quezon City Hall Complex, Elliptical Road, Quezon City

October 6, 2022

**REQUEST FOR EXPRESSION OF INTEREST FOR**

**CONSULTANCY SERVICES FOR THE QUEZON CITY CONSUMER AND  
BUSINESS PROFILING FOR QC COMMERCE HUBS PROGRAM  
(KOMERSYO KYUSI)**

1. The *Quezon City Local Government*, through the 2022 General Fund intends to apply the sum of **Two Million Nine Hundred Ninety-Five Thousand Pesos (Php 2,995,000.00)** being the Approved Budget for the Contract (ABC) to payments under the contract for **project number CONSUL-22-005**. Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
2. The *Quezon City Local Government* now calls for the submission of eligibility documents for **Consultancy Services for the Quezon City Consumer and Business Profiling for QC Commerce Hubs Program (Komersyo Kyusi)**. Eligibility documents of interested consultants must be duly received by the BAC Secretariat on or before **October 17, 2022 – 10:00AM**. at **2<sup>nd</sup> Floor, Procurement Department-Bidding Room, Finance Building, Quezon City Hall Compound**.

Eligibility Check will be on **October 17, 2022– 11:00 AM**. at **2<sup>nd</sup> Floor, Procurement Department-Bidding Room, Finance Building, Quezon City Hall Compound**, simultaneously via Zoom (virtual platform). Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion.

**Virtual Conference (ZOOM APP)**

**Meeting ID: 810 3646 5257**

**Password: 201522**

3. Interested bidders may obtain further information from *Quezon City Local Government* and inspect the Bidding Documents at the address given below during **8:00 a.m. – 5:00 p.m.**
4. A complete set of Bidding Documents may be acquired by interested Bidders on **October 7, 2022** from the address below upon submission of the following:
  - 4.1 PhilGEPS Registration Certificate (Platinum – 3 Pages)
  - 4.2 Printed Document Request List (DRL) from the Philippine Government Electronic Procurement System (PhilGEPS) website
  - 4.3 Notarized Joint Venture Agreement (if applicable)
  - 4.4 Letter of Intent

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.

5. The BAC shall draw up the short list of consultants from those who have submitted Expression of Interest, including the eligibility documents, and have been determined as eligible in accordance with the provisions of Republic Act 9184 (RA 9184), otherwise known as the “Government Procurement Reform Act”, and its Implementing Rules and Regulations (IRR). The shortlist shall not exceed three (3) prospective bidders who will be entitled to submit bids. The criteria and rating system for short listing are:



CRITERIA	RATING
Applicable experience of the consultant	50 points
Qualification of personnel	30 points
Current workload relative to capacity	20 points

6. Bidding will be conducted through open competitive bidding procedures using non-discretionary “pass/fail” criterion as specified in the IRR of RA 9184. Bidding is restricted to Filipino citizens/sole proprietorships, cooperatives, and partnerships or organizations with at least sixty percent (60%) interest or outstanding capital stock belonging to citizens of the Philippines.
7. The Procuring Entity shall evaluate bids using the Quality-Cost Based Evaluation/Selection (QCBE/QCBS). The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders.
8. The contract shall be completed in accordance with the Terms of Reference.
9. The *Quezon City Local Government* reserves the right to reject any and all bids, declare a failure of bidding, or not award the contract at any time prior to contract award in accordance with Section 41 of RA 9184 and its IRR, without thereby incurring any liability to the affected bidder or bidders.
10. For further information, please refer to:

**ATTY. DOMINIC B. GARCIA**  
 OIC, Procurement Department  
 2<sup>nd</sup> Floor, Procurement Department,  
 Finance Building, Quezon City Hall Compound  
 Elliptical Road, Barangay Central Diliman, Quezon City.  
 Tel. No. (02)8988-4242 loc. 8506/8710  
 Email Add: bacinfra.procurement@quezoncity.gov.ph  
 Website: [www.quezoncity.gov.ph](http://www.quezoncity.gov.ph)

By:

  
**ATTY. MARK DALE DIAMOND P. PERRAL**  
 Chairman BAC-Infra and Consultancy



# *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) PhilGEPS Certificate of Registration and Membership in accordance with Section 8.5.2 of the IRR, except for foreign bidders participating in the procurement by a Philippine Foreign Service Office or Post, which shall submit their eligibility documents under Section 24.1 of the IRR, provided, that the winning Consultant shall

register with PhilGEPS in accordance with Section 37.1.4 of the IRR;

Technical Documents

- (ii) Statement of the prospective bidder of all its ongoing and completed government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid, within the relevant period provided in the **EDS**. The statement shall include, for each contract, the following:
  - (ii.1) the name and location of the contract;
  - (ii.2) date of award of the contract;
  - (ii.3) type and brief description of consulting services;
  - (ii.4) consultant's role (whether main consultant, subconsultant, or partner in a JV)
  - (ii.5) amount of contract;
  - (ii.6) contract duration; and
  - (ii.7) certificate of satisfactory completion or equivalent document specified in the **EDS** issued by the client, in the case of a completed contract;
- (iii) Statement of the consultant specifying its nationality and confirming that those who will actually perform the service are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions in accordance with Clause 1.2, including their respective curriculum vitae.

(b) Class "B" Document –

If applicable, the Joint Venture Agreement (JVA) in case the joint venture is already in existence, or duly notarized statements from all the potential joint venture partners in accordance with Section 24.1(b) of the IRR of RA 9184.

- 2.2. The eligibility requirements or statements, the bids, and all other documents to be submitted to the BAC must be in English. If the eligibility requirements or statements, the bids, and all other documents submitted to the BAC are in foreign language other than English, it must be accompanied by a translation of the documents in English. The documents shall be translated by the relevant foreign government agency, the foreign government agency authorized to translate documents, or a registered translator in the foreign bidder's country; and shall be authenticated by the appropriate Philippine foreign service establishment/post or the equivalent office having jurisdiction over the foreign bidder's affairs in the Philippines. The English translation shall govern, for purposes of interpretation of the bid.
- 2.3. Prospective bidders may obtain a full range of expertise by associating with individual consultant(s) and/or other consultants or entities through a JV or subcontracting arrangements, as appropriate. However, subconsultants may only participate in the bid of one short listed consultant. Foreign Consultants shall seek

the participation of Filipino Consultants by entering into a JV with, or subcontracting part of the project to, Filipino Consultants.

### **3. Format and Signing of Eligibility Documents**

- 3.1. Prospective bidders shall submit their eligibility documents through their duly authorized representative on or before the deadline specified in Clause 5.
- 3.2. Prospective bidders shall prepare an original and copies of the eligibility documents. In the event of any discrepancy between the original and the copies, the original shall prevail.
- 3.3. The Eligibility Documents Submission Form shall be signed by the duly authorized representative/s of the Bidder. Failure to do so shall be a ground for the rejection of the eligibility documents.
- 3.4. Any interlineations, erasures, or overwriting shall be valid only if they are signed or initialed by the duly authorized representative/s of the prospective bidder.

### **4. Sealing and Marking of Eligibility Documents**

- 4.1. Prospective bidders shall enclose their original eligibility documents described in Clause 2.1, in a sealed envelope marked “ORIGINAL – ELIGIBILITY DOCUMENTS”. Each copy thereof shall be similarly sealed duly marking the envelopes as “COPY NO. \_\_\_\_ - ELIGIBILITY DOCUMENTS”. These envelopes containing the original and the copies shall then be enclosed in one single envelope.
- 4.2. The original and the number of copies of the eligibility documents as indicated in the **EDS** shall be typed or written in ink and shall be signed by the prospective bidder or its duly authorized representative/s.
- 4.3. All envelopes shall:
  - (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 **EDS**;
  - (d) bear the specific identification of this Project indicated in the **EDS**; and
  - (e) 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:
  - (f) the name of the prospective bidder;
  - (g) whether there is a modification or substitution; and
  - (h) 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	<b><i>CONSULTANCY SERVICES FOR THE QUEZON CITY CONSUMER AND BUSINESS PROFILING FOR QC COMMERCE HUBS PROGRAM (KOMERSYO KYUSI)</i></b>
1.3	No further instructions.
2.19(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"> <li>Valid DTI Registration Certificate or SEC Registration</li> <li>Valid Mayor’s/Business Permit or its Equivalent Document;</li> <li>Valid Tax Clearance;</li> <li>Audited Financial Statement for the last two (2) consecutive years</li> </ol>
2.1(a)(ii)	The statement of all ongoing and completed government and private contracts shall include all such contracts within <b><i>five (5) years</i></b> prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	Certificate of Satisfactory Completion or equivalent document issued by the client, in case of a completed contract, shall be acceptable
4.2	Each prospective bidder shall submit one (1) original and one (1) copy of its eligibility documents.
4.3 (c)	<p><i>State the Bids and Awards Committee of the Procuring Entity concerned with the Project.</i></p> <p><b><i>Procurement Department 2<sup>nd</sup> Floor, Finance Building, Quezon City Hall Compound, Barangay Central, Quezon City</i></b></p>
4.3 (d)	<p><i>State specific details concerning the identification of the Project</i></p> <p><i>Request for Expression of Interest</i></p> <p><b><i>CONSUL-22-005 – Consultancy Services for the Quezon City Consumer and Business Profiling for QC Commerce Hubs Program (Komersyo Kyusi)</i></b></p>
5	<p>The address for submission of eligibility documents is:</p> <p><b><i>QUEZON CITY GOVERNMENT</i></b>  Quezon City Hall Compound  Barangay Central, Quezon City</p> <p><b><i>ATTY. DOMINIC B. GARCIA</i></b>  <i>Procurement Department  2<sup>nd</sup> Floor, Finance Building,  Quezon City Hall Compound,  Barangay Central, Quezon City</i></p>

	<p>8988-4242 loc. 8709/8710  Email Add: <a href="mailto:bacinfra.procurement@quezoncity.gov.ph">bacinfra.procurement@quezoncity.gov.ph</a>  Website: <a href="http://www.quezoncity.gov.ph">www.quezoncity.gov.ph</a></p> <p>The deadline for submission of eligibility documents is on or before <b>October 17, 2022 – 10:00AM.</b></p>
8.1	<p>The place of opening of eligibility documents is <b>2<sup>nd</sup> Floor, Finance Building, Quezon City Hall Compound</b>, simultaneously via Zoom (virtual platform)</p> <p><b>Virtual Conference (ZOOM APP)</b>  <b>Meeting ID: 810 3646 5257</b>  <b>Password: 201522</b></p> <p>The date and time of opening of eligibility documents is <b>October 17, 2022 – 11:00 AM.</b></p>
9.1	Similar contracts shall refer to the same nature as the project to be bid.
9.2	<p>1. Set of Criteria</p> <p>Among others:</p> <p>1.1 Experience of the consultant – 50%</p> <p>1.2 Qualification of personnel to be assign – 30%</p> <p>1.3 Current work load in relations to capacity- 20%</p> <p>2. Rating System</p> <p>2.1 Shortlisted consultant must obtain a score of 70% or higher</p>

**TERMS OF REFERENCE  
FOR THE QUEZON CITY CONSUMER AND BUSINESS  
PROFILING FOR QC COMMERCE HUBS PROGRAM (KOMERSYO KYUSI)**

**I. RATIONALE**

In accordance with Ordinance No. SP-2219, S-2013 otherwise known as “An Ordinance Adopting the Economic Development Incentives Code of Quezon City”, the Local Economic Investment Promotions Office (LEIPO) shall be the implementing arm of the Quezon City Economic Development Incentives Code and shall function as the Technical Secretariat of the Quezon City Economic Development Investment Board (QC-EDIB).

LEIPO shall prepare the Investment Priorities Plan which shall be based primarily on the development agenda set forth by the City as embodied in its various policy documents.

The Quezon City Government recognizes the importance of business investments, in contributing to the City's economic development as stated in the Economic Development and Investment Plan 2022-2025 approved under Resolution No. 8707, S. 2021.

**II. PROJECT DESCRIPTION**

The project plays a crucial role in the initiative of the LGU that aims to cater to the Quezon City business sector and identify specific areas for business activities related to transport, storage, distribution and retailing of goods. The Feasibility Study will provide baseline data to guide decision makers on the creation of and over-all operations of businesses located in Quezon City.

It is an important aspect in terms of determining businesses' operation effectiveness, financial viability, and contribution to the City's socio-economic needs.

Commerce hubs are envisioned as “centers of gravity” where buyers and sellers of various goods and services converge, giving rise to other economic activities and infrastructure development.

Information from this study can also be used to advise potential and existing investors to set up their business in various locations in the city that will be more beneficial for their growth and development.

The study will further aid LGU decision-makers, specifically, the Office of the City Mayor and the Economic Development Investment Board.

### III. SCOPE OF WORK

1. Use a triangulation approach that applies the three research methods, these are:
  - A. Desk research (secondary data)
  - B. In-depth interviews with subject matter experts
  - C. Focus group discussions
  - D. Quantitative study via telephone or online interviews or face-to-face

#### A. Desk Research

1. Update all existing data used by Local Economic Investment Promotion Office for policy formulation by revisiting all local sources of data and consolidating data that maybe available during the survey period which are specifically related to identification of investment opportunities and activities.
2. These local sources include the Department of Trade and Industry, various offices in the Quezon City LGU, and other institutions with specific interests on investment opportunities.

Board of Investments	DILG Bureau of Local Government Department	Department of Trade and Industry	Philippine Chamber of Commerce Quezon City
Philippine Marketing Association	Local Economic Development and Investment Promotions - NCR	QC-Local Economic Investment Promotion Office	Philippine Retailers Association
Federation of Philippine Industries	Design Center of the Philippines - Market Development and Administration Department	QC - Business Permits and Licensing Department	QC - Sustainable Development Affairs Unit
Quezon City Tourism Department	Small Business and Cooperatives Development and	Council Sectoral Representatives	Investment Affairs Office

		Promotions Office		
Barangay and Community Relations Department		City Planning and Development Office	Quezon City University	Education Affairs Unit
National Youth Commission		Environment Protection and Waste Management Department	Department of Education	City Architect Department
National Economic Development Authority		Department of Labor and Employment	Commission on Higher Education	TESDA

3. This research intends to revisit and document the relevant discussions, inputs, and materials related to the updating of Quezon City Economic Development and Investment Plan 2022-2025 and implementation of SP-2219, S-2013 which mandates to craft measures, including incentives, in order to attract investors in the city.
4. The desk research shall likewise cover other data sources which produce and publish policy papers (latest and relevant) on various topics particularly on attracting and development of investment opportunities, if available.
5. This is submitted electronically in table format outlining the list of resources and highlighted information for each.

#### **B. In-Depth Interviews**

1. Conduct online interviews with 7-10 subject matter experts coming from the following institutions:
  - a. Two subject matter experts from the Department of Trade Industry, Board of Investment, National Economic Development Authority, Quezon City Investment Affairs Office, Tourism Department, Small Business and

Cooperatives Development and Promotions Office, and Business Permits and Licensing Department.

- b. Two subject matter experts from TESDA, Commission on Higher Education, and Department of Education, Quezon City Education Affairs Unit, Quezon City University, Department of Labor and Employment.
  - c. Two subject matter experts from Barangay and Community Relations Department, Council of Sectoral Representatives, City Planning and Development Office, Philippine Retailers Association, Philippine Marketing Association.
  - d. Two Congressman from the 6 districts of Quezon City.
  - e. Two Councilors from the 6 districts of Quezon City.
2. Conduct individual in-depth interviews with the nominated subject matter experts during the survey period. These interviews will be organized and scheduled in coordination with QC-LEIPO and according to the preferred schedules of the subject matter experts but limited only to the designated survey period.
  3. All interviews will be recorded and documented and subsequently summarized to aid in the analysis of all other survey findings, and to discover other insights and development that may not be available in the desk research and quantitative study. i-Metrics will exercise data privacy rules and will report findings without attribution to the individual respondents and participants.

### **C. Focus Group Discussions**

### **D. Quantitative Survey**

1. To statistically determine investment opportunities for the six districts of Quezon City, we propose to interview a random sample of 120 businesses (less than 5 years old), in particular business owners or managers who are responsible in marketing and expansion, to help establish the Quezon City consumer profile and identify investment opportunities in Quezon City.

Area	Proposed Sample	Industry
District 1	20	Contracting, retail, hotel and lodging, eating establishments, amusement centers, financial institutions, learning institutions.

District 2	20	Learning institutions, contracting, real, wholesale, financial institutions, retail
District 3	20	Amusement centers, financial institution, learning institution, contracting, export, import, lodging houses, shopping centers, eating establishments, wholesale, retail, manufacturing
District 4	20	Financial institutions, contracting, eating establishment, export, import, lodging houses, retail and wholesale, amusement centers, learning institutions, manufacturing, shopping centers
District 5	20	Retail, contracting, hotel and lodging, learning institutions, shopping centers, amusement centers, financial institutions, manufacturing, eating establishments, export and import, wholesale.
District 6	20	Contracting, retail, hotel and lodging, manufacturing, export and import, contracting, amusement centers, financial institutions, lodging houses, eating establishments, learning institutions
Total Proposed Sample	120	

2. At a 95% confidence level, a sample size of  $n=120$  respondents, selected probabilistically, yields a margin of error of  $\pm 8.95\%$ . This means that if the same survey is done 20 times, in 19 out of 20 cases, the studies will yield the same results within an error range of  $\pm 8.95\%$ . This assumes that respondent selection is done systematically and without intended bias.



3. More important than the sample size is the manner by which respondents in the 6 districts shall be selected. We propose to cover managers handling marketing and expansion.
4. Draft a survey instrument to be submitted to QC-LEIPO for review and enhancements. This instrument shall cover the essential elements for capturing the defining Quezon City Consumer and opportunities for expansion within Quezon City.

## 2. Data Analysis

- A. Show statistical results by District and overall. This means that reviewers of the data will have a multi-dimensional view of the statistical results and a chance to identify areas or data for further statistical analysis.
- B. Standard statistical procedures shall be used to summarize the survey data including frequency counts, percentages, and measures of central tendency.
- C. For tabulation of survey findings, use statistical tools with a proven capacity of programming and producing 200 pages of statistical reports and multi-dimensional tables within five working days.
- D. For data management and analysis, use various statistical tools. These tools can import files in different file formats such as ASCII, flat files, Excel files, DBF files and other relational databases (such as Oracle, Sybase, SAS, Progress). Conversely, these tools can export into these same file formats if necessary and required.

## IV. AREA OF COVERAGE

The target respondents of the study will include selected businesses and consumers located within the six (6) districts of Quezon City. In coordination with the End-user and Business Permits and Licensing Department, the list of registered businesses and contact details will be used to generate the target respondents for the research.

The final report and presentation shall be delivered and undertaken at the Local Economic Investment Promotions Office.

## V. PROJECT STANDARDS AND REQUIREMENTS

1. The bidder/service provider should have at least two (2) years of actual experience in providing services related to the project such as feasibility studies, market research, etc.
2. Submission of the following Key Personnel and required qualification & Experience (Resume and List must be submitted):

POSITION	TASK	REQUIREMENT
Project Leader	Oversees the entire project	<ul style="list-style-type: none"> <li>• Graduate of any business-related course</li> <li>• With at least five (5) years of experience working on research and studies.</li> </ul>
Overall Supervisor	Supervise and ensure that the scheduled tasks are done.	<ul style="list-style-type: none"> <li>• Graduate of any business-related course</li> <li>• With at least five (5) years of experience working on research and studies.</li> </ul>
Project Coordinator and Statistician	Formulate and analyze data. Managing and distributing information within the project.	<ul style="list-style-type: none"> <li>• Graduate of Bachelor of Science in Statistics or Mathematics or Engineering</li> <li>• With at least five (5) years of experience working on research and studies.</li> </ul>
Project Statistician	Produces Tables and Charts for exports	<ul style="list-style-type: none"> <li>• Graduate of Bachelor of Science in Statistics or Mathematics or Engineering</li> <li>• With at least five (5) years of experience working on research and studies.</li> </ul>

3. Criteria for Eligibility Evaluation:

- a. Applicable experience of personnel -50%

- b. Qualification of personnel - 30%
- c. Current workload capacity - 20%

4. Criteria for Technical Evaluation

- a. Quality of personnel to be assigned to the Project - 50%
- b. Experience and capability of personnel- 40%
- c. Plan of approach and methodology - 10%

5. Technical and Financial Weights using Quality-Cost Based Evaluation Procedure:

- a. Technical - 70%
- b. Financial - 30%

**VI. PROJECT DURATION**

The Quezon City Economic Promotions Program shall be valid for six (6) months upon issuance of Notice to Proceed

**VII. APPROVED BUDGET FOR THE CONTRACT**

The sum of Two Million Nine Hundred Ninety Five Thousand Pesos Only (Php2,995,000.00) is the Approved Budget for the Contract for the above-mentioned project.

Source of Fund: Local Economic Investment Promotions Office

**VIII. BASIS OF PAYMENT**

No.	Particular	Weight
1	Upon approval of instrument to be used for the research	15%
2	Upon submission of progress report on data gathering, encoding and processing of data	40%
3	Upon submission of the following: <ul style="list-style-type: none"> <li>- 3 hard copies and soft copy of the completed report</li> <li>- powerpoint presentation for the summary of the report</li> <li>- presentation of the findings ith officials and guests defined by QC LEIPO</li> <li>- soft copy of the raw data/research data/and other related information in Excel and CSV file formats</li> </ul>	45%

**IX. PENALTIES FOR BREACH OF CONTRACT**

Failure to deliver the services and shall subject the Contractor to penalties and/or liquidated damages pursuant to RA 9184 AN ACT PROVIDING FOR THE MODERNIZATION, STANDARDIZATION AND REGULATION OF THE PROCUREMENT ACTIVITIES OF THE GOVERNMENT AND FOR OTHER PURPOSES and its revised Implementing Rules and Regulations.

**X. CANCELLATION OR TERMINATION OF CONTRACT**

Should there be any dispute, controversy or difference between the parties arising out of this TOR, the parties herein shall exert efforts to amicably settle such dispute or difference. However, if any dispute, controversy or difference cannot be resolved by them amicably to the mutual satisfaction of the parties, then the matter may be submitted for arbitration in accordance with existing laws, without prejudice for the aggrieved party to seek redress before a court of competent jurisdiction.

The guidelines contained in RA 9184 and its revised IRR shall be followed in the termination of any service contract. In the event the City terminated the Contract due to default insolvency, or for cause, it may enter into negotiated procurement pursuant to section 53(d) of RA 9184 and its IRR.



**MR. PIERANGELO A. DOMINGUEZ**

OIC- Local Economic Investment Promotions Office

**ELIGIBILITY DOCUMENTS SUBMISSION FORM**

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*[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 eligibility documents in compliance with the Eligibility Documents therefor.

In line with this submission, we certify that:

- a) *[Name of Consultant]* is not blacklisted or barred from bidding by the GoP or any of its agencies, offices, corporations, LGUs, or autonomous regional government, including foreign government/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 Eligibility Document Submission Form shall be a ground for our disqualification.

Yours sincerely,

Signature  
Name and Title of Authorized Signatory  
Name of Consultant  
Address

**“ANNEX B”****List of all Ongoing Government & Private Contracts including contracts awarded but not yet started**

Business Name : \_\_\_\_\_

Business Address : \_\_\_\_\_

Name and Location of Project	Description of the Project	Date of Award of the Contract	Consultant's Role	Amount of Contract	Contract Duration
			Description		
<u>Government</u>					
<u>Private</u>					

Submitted by : \_\_\_\_\_

(Printed Name &amp; Signature of Representative of Bidder)

Designation : \_\_\_\_\_

Date : \_\_\_\_\_

**“ANNEX C”**

List of Completed Government & Private Contracts within the last five (5) years

Business Name : \_\_\_\_\_  
Business Address : \_\_\_\_\_

Name and Location of Project	Description of the Project	Date of Award of the Contract	Consultant's Role	Amount of Contract	Contract Duration
			Description		
<u>Government</u>					
<u>Private</u>					

Attachments:

1. Certificate of satisfactory completion issued by the client

Submitted by : \_\_\_\_\_  
(Printed Name & Signature of Representative of Bidder)

Designation : \_\_\_\_\_

Date : \_\_\_\_\_



**STATEMENT ON CITIZENSHIP & PROFESSIONAL REGISTRATION**

Date of Issuance

Ma. Josefina G. Belmonte  
Mayor  
City of Quezon  
Quezon City, Philippines

Attention : **The Chairperson**  
Bids and Awards Committee

Dear Sir/Madame:

In compliance with the requirements of the (Name of the Procuring Entity) BAC for the bidding of the (Name of the Project), I hereby certify that:

I am a (Nationality) citizen wishing to participate in the bidding.  
I have the technical and financial capabilities to satisfactorily render the required services.  
I possess the required professional license issued by the professional Regulation Commission or other appropriate regulatory body (name of other regulatory body).

Very truly yours,

Name of Authorized Representative

Position

Name of the Bidder