

PHILIPPINE BIDDING DOCUMENTS

ELIGIBILITY DOCUMENTS

Procurement of CONSULTANCY SERVICES

for the

Customer Satisfaction Survey

Contract No. RO-CS2021-001

Government of the Republic of the Philippines

**Fifth Edition
August 2016**

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



REQUEST FOR EXPRESSION OF INTEREST FOR THE PROCUREMENT OF CONSULTANCY SERVICES FOR THE CUSTOMER SATISFACTION SURVEY

1. The Metropolitan Waterworks and Sewerage System Regulatory Office (MWSS RO), through the Corporate Operating Budget (COB) CY 2021 intends to apply the sum of **SIX MILLION and 0/100 PESOS (PhP 6,000,000.00)** being the Approved Budget for the Contract (ABC) to payments under the contract for the **Procurement of Consultancy Services for the Customer Satisfaction Survey with Contract No. RO-CS2021-001**. Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
2. The MWSS RO now calls for the submission of eligibility documents for the conduct of a Customer Satisfaction Survey by an independent third party to determine the level of satisfaction of its stakeholders. Eligibility documents of interested consultants must be duly received by the BAC Secretariat on or before **17 June 2021, 11:30 AM** at the office address indicated below. Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion.
3. Interested bidders may obtain further information from the MWSS RO and inspect the Bidding Documents at the address given below from **8:00 AM to 3:00 PM**. For purposes of compliance with community quarantine and social distancing protocols given the current COVID-19 pandemic, interested bidders intending to inspect or purchase bidding documents are advised to first set an appointment with the MWSS RO through the contact details provided below before proceeding to the MWSS RO premises.

The bidding process shall be governed by the **Advisory/Quick Guide Re: Conduct of Procurement Activities by the MWSS RO Bids and Awards Committee** (Annex “A”), **Google Hangouts Meet Quick Guide** (Annex “B”), and **Office Order No. 55, Series of 2020, “Interim Quarantine and Social Distancing Protocols”** (Annex “C”). Accordingly, interested bidders must strictly comply with the foregoing issuances as well as all laws, guidelines, rules, and regulations on community quarantine and social distancing.

4. The Bidding Documents for eligibility may be acquired by interested Bidders starting **10 June 2021** from the address below and upon payment of the applicable fee for the Bidding Documents, pursuant to the latest Guidelines issued by the GPPB, in the amount of **FIVE THOUSAND AND 0/100 PESOS (PhP 5,000.00)**. Payment for the applicable fee shall be through electronic fund transfer (ETF) or deposit at any Land Bank of the Philippines branch to the **MWSS RO Current Account No. 1462-1011-78**. Proof of payment shall be sent to Mr. Alan Chuegan, Mr. Sir Gil Maravilla, and Mr. Justine Irish Ignacio through the e-mail addresses alan.chuegan@ro.mwss.gov.ph, sirgil.maravilla@ro.mwss.gov.ph, and justineirish.ignacio@ro.mwss.gov.ph on or before the deadline of submission of bidding documents, subject to verification.

The Bidding Documents may also be downloaded free of charge from the website of the Philippine Government Electronic Procurement System (PhilGEPS) at <https://www.philgeps.gov.ph> and the website of the MWSS RO at <https://ro.mwss.gov.ph>, provided that Bidders shall pay the applicable fee for the Bidding Documents not later than the submission of their bids.

5. The BAC shall draw up the short list of consultants from those who have submitted Expression of Interest, including the eligibility documents, and have been determined as eligible in accordance with the provisions of Republic Act 9184 (RA 9184), otherwise known as the “Government Procurement Reform Act”, and its Implementing Rules and Regulations (IRR). The short list shall consist of at most three (3) prospective bidders who will be entitled to submit bids. The criteria and rating system for short listing are:

Criteria	Rating
Applicable Experience	50 Points
Quality of Personnel to be Assigned	30 Points
Job 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 open to all interested bidders, whether local or foreign, subject to the conditions for eligibility provided in the IRR of RA 9184.

7. The MWSS RO shall evaluate bids 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. The contract shall be completed within **one (1) year** reckoned from receipt of the Notice to Proceed (NTP).
9. The MWSS RO 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:

LEE ROBERT M. BRITANICO

MWSS Regulatory Office Bids and Awards Committee

3rd Floor, Engineering Building, MWSS Complex

Katipunan Road, Balara, Quezon City

Telefax Number: (02) 3435-8903 / (02) 8925-6619

E-mail address: sirgil.maravilla@ro.mwss.gov.ph

justineirish.ignacio@ro.mwss.gov.ph

10 June 2021

LEE ROBERT M. BRITANICO

Chairperson, MWSS RO BAC

Section II. Eligibility Documents

1. Eligibility Criteria

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

2. Eligibility Requirements

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

Legal Documents

- (i) PhilGEPS Certificate of Registration and Membership in accordance with Section 8.5.2 of the IRR, except for foreign bidders participating in the procurement by a Philippine Foreign Service Office or Post, which shall submit their eligibility documents under Section 24.1 of the IRR, provided, that the winning Consultant shall register with PhilGEPS in accordance with Section 37.1.4 of the IRR;

Technical Documents

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

- (b) Class "B" Document –

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

- 2.2. The eligibility requirements or statements, the bids, and all other documents to be submitted to the BAC must be in English. If the eligibility requirements or statements, the bids, and all other documents submitted to the BAC are in foreign language other than English, it must be accompanied by a translation

of the documents in English. The documents shall be translated by the relevant foreign government agency, the foreign government agency authorized to translate documents, or a registered translator in the foreign bidder's country; and shall be authenticated by the appropriate Philippine foreign service establishment/post or the equivalent office having jurisdiction over the foreign bidder's affairs in the Philippines. The English translation shall govern, for purposes of interpretation of the bid.

- 2.3. Prospective bidders may obtain a full range of expertise by associating with individual consultant(s) and/or other consultants or entities through a JV or subcontracting arrangements, as appropriate. However, subconsultants may only participate in the bid of one short listed consultant. Foreign Consultants shall seek the participation of Filipino Consultants by entering into a JV with, or subcontracting part of the project to, Filipino Consultants.

3. Format and Signing of Eligibility Documents

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

4. Sealing and Marking of Eligibility Documents

- 4.1. Prospective bidders shall enclose their original eligibility documents described in Clause 2.1, in a sealed envelope marked "ORIGINAL – ELIGIBILITY DOCUMENTS". Each copy thereof shall be similarly sealed duly marking the envelopes as "COPY NO. ___ - ELIGIBILITY DOCUMENTS". These envelopes containing the original and the copies shall then be enclosed in one single envelope.
- 4.2. The original and the number of copies of the eligibility documents as indicated in the **EDS** shall be typed or written in ink and shall be signed by the prospective bidder or its duly authorized representative/s.
- 4.3. All envelopes shall:
 - (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:

- (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 eligibility documents vis-à-vis a checklist of the required documents.

- 8.4. The eligibility of each prospective bidder shall be determined by examining each bidder's eligibility requirements or statements against a checklist of requirements, using non-discretionary "pass/fail" criterion, as stated in the Request for Expression of Interest, and shall be determined as either "eligible" or "ineligible." If a prospective bidder submits the specific eligibility document required, he shall be rated "passed" for that particular requirement. In this regard, failure to submit a requirement, or an incomplete or patently insufficient submission, shall be considered "failed" for the particular eligibility requirement concerned. If a prospective bidder is rated "passed" for all the eligibility requirements, he shall be considered eligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as "eligible." If a prospective bidder is rated "failed" in any of the eligibility requirements, he shall be considered ineligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as "ineligible." In either case, the BAC chairperson or his duly designated authority shall countersign the markings.

9. Short Listing of Consultants

- 9.1. Only prospective bidders whose submitted contracts are similar in nature and complexity to the contract to be bid as provided in the **EDS** shall be considered for short listing.
- 9.2. The BAC shall draw up the short list of prospective bidders from those declared eligible using the detailed set of criteria and rating system to be used specified in the **EDS**.
- 9.3. Short listed consultants shall be invited to participate in the bidding for this project through a Notice of Eligibility and Short Listing issued by the BAC.

10. Protest Mechanism

Decision of the Procuring Entity at any stage of the procurement process may be questioned in accordance with Section 55 of the IRR of RA 9184

Section III. Eligibility Data Sheet

Eligibility Data Sheet

Eligibility Documents													
1.2	<p>The minimum required experience of proposed professional staff is as follows:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 35%; text-align: left; padding: 5px;">Proposed Personnel</th> <th style="width: 65%; text-align: left; padding: 5px;">Length of Experience Requirement</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">Project Manager</td> <td style="padding: 5px;"> <ul style="list-style-type: none"> • At least BS/BA holder experience; MA/MS Statistics or Economics an advantage • At least 5 years relevant experience in conducting consumer surveys in the Philippines • At least 10 years relevant experience in supervising consumer surveys in the Philippines </td> </tr> <tr> <td style="padding: 5px;">Research Executive</td> <td style="padding: 5px;"> <ul style="list-style-type: none"> • At least BS/BA holder experience; MA/MS Statistics or Economics an advantage • At least 2 years relevant experience in conducting and supervising consumer surveys in the Philippines </td> </tr> <tr> <td style="padding: 5px;">Field Manager</td> <td style="padding: 5px;"> <ul style="list-style-type: none"> • At least BS/BA holder • At least 5 years relevant experience in conducting and supervising consumer surveys in the Philippines, preferably with fieldwork exposure • Must have been a Team Leader in similar and/or relevant consulting services </td> </tr> <tr> <td style="padding: 5px;">Field Supervisors</td> <td style="padding: 5px;"> <ul style="list-style-type: none"> • At least BS/BA holder experience • At least 3 years relevant experience in conducting and supervising surveys in the Philippines, preferably thru face-to-face/phone surveys </td> </tr> <tr> <td style="padding: 5px;">Data Processing Manager</td> <td style="padding: 5px;"> <ul style="list-style-type: none"> • At least BS/BA holder experience • At least 2 years experience in data processing • With experience working in surveys • Proficient in data entry/data analysis software </td> </tr> </tbody> </table>	Proposed Personnel	Length of Experience Requirement	Project Manager	<ul style="list-style-type: none"> • At least BS/BA holder experience; MA/MS Statistics or Economics an advantage • At least 5 years relevant experience in conducting consumer surveys in the Philippines • At least 10 years relevant experience in supervising consumer surveys in the Philippines 	Research Executive	<ul style="list-style-type: none"> • At least BS/BA holder experience; MA/MS Statistics or Economics an advantage • At least 2 years relevant experience in conducting and supervising consumer surveys in the Philippines 	Field Manager	<ul style="list-style-type: none"> • At least BS/BA holder • At least 5 years relevant experience in conducting and supervising consumer surveys in the Philippines, preferably with fieldwork exposure • Must have been a Team Leader in similar and/or relevant consulting services 	Field Supervisors	<ul style="list-style-type: none"> • At least BS/BA holder experience • At least 3 years relevant experience in conducting and supervising surveys in the Philippines, preferably thru face-to-face/phone surveys 	Data Processing Manager	<ul style="list-style-type: none"> • At least BS/BA holder experience • At least 2 years experience in data processing • With experience working in surveys • Proficient in data entry/data analysis software
Proposed Personnel	Length of Experience Requirement												
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Field Manager	<ul style="list-style-type: none"> • At least BS/BA holder • At least 5 years relevant experience in conducting and supervising consumer surveys in the Philippines, preferably with fieldwork exposure • Must have been a Team Leader in similar and/or relevant consulting services 												
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Data Processing Manager	<ul style="list-style-type: none"> • At least BS/BA holder experience • At least 2 years experience in data processing • With experience working in surveys • Proficient in data entry/data analysis software 												
	<p>If any document or report is required by law, policy, or regulation to be signed by a registered professional, then the key personnel signing such document or report must be a nominated key professional and must comply with the requirements provided in this EDS.</p>												

1.3	<p>Foreign consultants may be eligible to participate in this Project, subject to the following conditions to be complied within ten (10) days upon receipt of the Notice of Award:</p> <p>a) must be registered with the SEC and/or any agency authorized by the laws of the Philippines;</p> <p>b) when the types and fields of consulting services in which the foreign consultant wishes to engage involve the practice of regulated professions, the foreign consultant must be authorized by the appropriate GoP professional regulatory body specified in Clause 1.2 to engage in the practice of those professions and allied professions: <i>Provided, however,</i> That the limits of such authority shall be strictly observed.</p>
2.1(a)(ii)	<p>The statement of all ongoing and completed government and private contracts shall include all such contracts within the last ten (10) years prior to the deadline for the submission and receipt of eligibility documents.</p>
2.1(a)(ii.7)	<p>The consultant shall submit certificate or acceptable proof of satisfactory completion or acceptance issued by the client. In the event that a certificate of satisfactory completion cannot be secured, a letter or any document from the client stating satisfactory completions of work will suffice.</p>
4.2	<p>Each prospective bidder shall submit hardcopies of its eligibility documents, consisting of one (1) original and two (2) copies.</p> <p>Each must be properly labeled, bound, and tabbed for easy reference. Moreover, all pages of documents submitted must be numbered.</p> <p>However, non-compliance with the labeling, binding, and tabbing, and page numbering requirement shall not be a ground for disqualification.</p>
4.3(c)	<p>LEE ROBERT M. BRITANICO MWSS Regulatory Office Bids and Awards Committee 3rd Floor, Engineering Building, MWSS Complex Katipunan Road, Balara, Quezon City Telefax Number: (02) 3435-8903 / (02) 8925-6619 E-mail address: sirgil.maravilla@ro.mwss.gov.ph, justineirish.ignacio@ro.mwss.gov.ph</p>
4.3(d)	<p>Consultancy Services for the Customer Satisfaction Survey</p>
5	<p>The address for submission of eligibility documents is 3rd Floor, Engineering Building, MWSS Complex, Katipunan Road, Balara, Quezon City.</p> <p>The deadline for submission of eligibility documents is 17 June 2021, 11:30 AM.</p>

8	Opening of eligibility documents shall be on 17 June 2021, 2:00 PM to be conducted through online video conferencing using the Google Meet platform. Eligibility documents will be opened in the presence of the prospective bidder's representatives who choose to attend the activity.
9.1	Consulting services considered comparable in nature to the contract under consideration are conduct of consumer surveys and executive interviews among corporate respondents.
9.2	<p>The criteria and rating system for short listing are:</p> <ol style="list-style-type: none"> 1. Applicable experience of the consultant considering the overall experiences of the firm – <i>fifty (50) points</i> 2. Qualification of personnel who may be assigned to the job vis-à-vis extent and complexity of undertaking. Refer to EDS Line 1.2 – <i>thirty (30) points</i> 3. Current workload relative to job capacity – <i>twenty (20) points</i>

***Section IV. Consultant's Confidential
Application for Eligibility***



**CONSULTANT’S CONFIDENTIAL APPLICATION FOR ELIGIBILITY
Consultancy Services for the Customer Satisfaction Survey
Contract No. RO-CS2021-001**

Date: _____

LEE ROBERT M. BRITANICO
Chairperson, MWSS-RO Bids and Awards Committee (MWSS-RO BAC)

Gentlemen:

I _____ of legal age, with postal address at _____, under oath, hereby deposes and states:

1. That I am the _____ of _____ duly authorized to make this statement, as evidence by the attached written authority from the proprietor/governing board of the firm;
2. I understand that any information found to be false or misrepresentation of my firm/company would constitute grounds for disqualification; and
3. That I hereby present the attached Information for Eligibility and to Bid with the Metropolitan Waterworks and Sewerage System – Regulatory Office (MWSS-RO).

IN WITNESS WHEREOF, I hereby affix my signature this ___ day of _____, 2021 at _____, Philippines.

AFFIANT

SUBSCRIBED AND SWORN TO before me this ___ day of _____, 2021, affiant exhibiting to me his/her Community Tax Certificate No. _____ issued on _____ at _____, Philippines.

NOTARY PUBLIC

Until _____
PTR No. _____
Date _____
Place _____
TIN _____

Doc. No.: _____
Page No.: _____
Book No.: _____
Series of _____

A.1 Name of Primary Firm/Company: _____

- a. Acronym : _____
- b. Year Established : _____
- c. Main Office Address : Street#: _____ Street Name _____
Town/City Name: _____
Postal Code: _____ Region: _____
- d. Phone Number : _____ e. Email Address _____
- f. Fax Number : _____ g. Telex Number _____
- h. Former Names of the Firm/Company: _____

i. Type of Organization (please check all that apply):

- Sole Proprietorship Corporation
- Partnership Others _____

j. Type of Consulting Services Offered (please check all that apply)

- Advisory and Review Services Pre-Investment or Feasibility Study
- Design Construction Supervision
- Management and Related Services Other Technical Services or
Special Studies

A.2 Contact Person 1

- a. Name : _____
- b. Designation : _____
- c. Phone Number : _____
- d. Specimen Signature : _____

A.3 Contact Person 2

- a. Name : _____
- b. Designation : _____
- c. Phone Number : _____
- d. Specimen Signature : _____

ASSOCIATE FIRMS

B.1 Firm 1

- a. Acronym : _____
b. Year Established : _____
c. Main Office Address :Street#:_____ Street Name _____
Town/City Name:_____
Postal Code:_____ Region: _____
d. Phone Number : _____ e. Email Address _____
f. Fax Number : _____ g. Telex Number _____
h. Former Names of the Firm/Company: _____

i. Type of Organization (please check all that apply):

- Sole Proprietorship Corporation
 Partnership Others _____

j. Type of Consulting Services Offered (please check all that apply)

- Advisory and Review Services Pre-Investment or Feasibility Study
 Design Construction Supervision
 Management and Related Services Other Technical Services or Special Studies

B.2 Firm 2

- a. Acronym : _____
b. Year Established : _____
c. Main Office Address :Street#:_____ Street Name _____
Town/City Name:_____
Postal Code:_____ Region: _____
d. Phone Number : _____ e. Email Address _____
f. Fax Number : _____ g. Telex Number _____
h. Former Names of the Firm/Company: _____

i. Type of Organization (please check all that apply):

- Sole Proprietorship Corporation
 Partnership Others _____

j. Type of Consulting Services Offered (please check all that apply)

- Advisory and Review Services Pre-Investment or Feasibility Study
 Design Construction Supervision
 Management and Related Services Other Technical Services or Special Studies

B. OWNERSHIP (complete a separate form for the Primary Firm and each Associate Firm)

Name of Firm/Company: _____

Name(s) of Owner/Stockholders /Partners	Tax ID Number*/PRC No.* /Passport No.** TIN *Local **Foreign	Nationality

C. PERSONNEL (complete a separate form for the Primary Firm and each Associate Firm)

Name of Consultant : _____

Business Address : _____

a. Number of Key Technical Personnel by Professional Category:		b. Number of Technical Support Personnel by Professional Category:			
1. Project Manager		1. Project Manager			
2. Assistant Project Manager/Statistician		2. Assistant Project Manager/Statistician			
3. Field Manager		3. Field Manager			
4. Field Supervisors		4. Field Supervisors			
5. Data Processing Manager/Analyst		5. Data Processing Manager/Analyst			
6. Field Interviewers		6. Field Interviewers			
		c. Number of Administrative Staff:			
TOTAL NO. OF PERSONNEL: (a+b+c)					
a. Proposed Position / Names of Professional Staff that may be Assigned to this Project	Tax ID No.*/PRC No.*/Passport No.** * Local ** Foreign	Professional Category	Status*	Nationality	
1. Project Manager					
2. Assistant Project Manager/Statistician					
3. Field Manager					
4. Field Supervisors					
5. Data Processing Manager/Analyst					
6. Field Interviewers					

D.1 Personnel Biodata (complete a separate form for the Primary Firm and each Associated Firm for all personnel listed in Section D that may be assigned to this project)

- 1. Name : _____
- 2. Date of Birth : _____
- 3. Nationality : _____
- 4. Education and Degrees : _____
- 5. Specialty : _____
- 6. Registration : _____
- 7. Length of Service with the Firm: _____ Year from _____ (months) _____ (year)
To _____ (months) _____ (year)
- 8. Years of Experience : _____
- 9. Training: : (indicate significant training since graduation and inclusive dates of attendance)

- 10. If Item 7 is less than ten (10) years, give name and length of service with previous employers for a ten (10)-year period (attached additional sheet/s), if necessary:

<u>Name and Address of Employer</u>	<u>Length of Service</u>
_____	_____ year(s) from _____ to _____
_____	_____ year(s) from _____ to _____
_____	_____ year(s) from _____ to _____

11. Work Experience:

This should cover personnel years of experience. (Attach as many pages as necessary to show involvement of personnel in projects. Starting with present position, list in reverse order every employment held. List all positions held by staff member since graduation, giving dates, names of employing organizations, titles of positions held, locations of projects and description of duties. For experience in last ten years, also give types of activities performed and client references, where appropriate).

D. CLASS “A” DOCUMENTARY REQUIREMENTS

E.1 Legal Documents

E.1.1 Registration/Licenses

	Registration/ License #	Place of Registration	Date of Reg. (mm/dd/yy)	Expiration Date (mm/dd/yy)
PhilGEPS Registration and Membership <i>(Platinum Member - dispense submission of Class A Legal and Financial Documents; Non-Platinum Member - submit Class A Legal and Financial Documents)</i>				
DTI Business Name Registration (if sole proprietorship)				
SEC (if partnership or corporation) Certificate				
SEC Registration (if Foreign Consultant)				
CDA Registration Certificate (for Cooperatives)				
Valid and Current MAYOR’S Permit				
Tax Clearance				

Note: In case of foreign consultants, the above requirements may be substituted by the appropriate equivalent documents issued by the foreign consultant’s country.

Percentage of ownership of the firm’s assets:

Filipino : _____ %
Other Nationalities : _____ %

E.2 Technical Documents

E.2.1 Experience (complete a separate form for the Primary Firm and each Associate Firm)

- a. Consultant’s **Comparable** Work Experience - List of (maximum of 5 for all firms) government and private consulting services contracts of size, complexity and technical specialty **comparable** to the project under consideration completed by the Firm/Company for the last preceding 10 years. Cost must be in Philippine Pesos computed on the date of the signing of the contract.

Name of Firm/Company : _____

Contract Name	Location	Name of Client	Contract Date (mm/dd/yy)		Cost of Consultancy Contract	% Participation	Primary or Associate Firm P or A	Category of Service Rendered
			Start	Actual Completion				
1.								
2.								
3.								
4.								
5.								

Category of Services Rendered: A – Advisory and Review Services, P – Pre-Investment or Feasibility Studies, D – Detailed Design, C – Construction Supervision, O – Other Technical Services or Special Studies

Note: Attach certified copy of Certificate of Satisfactory Completion issued by the Client and/or Document/Receipt indicating proof of Final Payment (Annex G)

- b. Consultant's **Related** Work Experience – List of (maximum of 10 for all firms) government and private consulting services contracts related to the project under consideration completed by the Firm/Company for the last preceding 10 years. Cost must be in Philippine Pesos computed on the date of the signing of the contract.

Name of Firm/Company : _____

Contract Name	Location	Name of Client	Contract Date (mm/dd/yy)		Cost of Consultancy Contract	% Participation	Primary or Associate Firm <u>P or A</u>	Category of Service Rendered
			Start	Actual Completion				
1.								
2.								
3.								
4.								
5.								
6.								
7.								
8.								
9.								
10.								

Category of Services Rendered: A – Advisory and Review Services, P – Pre-Investment or Feasibility Studies, D – Detailed Design, C – Construction Supervision, O – Other Technical Services or Special Studies

Note: Attach certified copy of Certificate of Satisfactory Completion issued by the Client and/or Document/Receipt indicating proof of Final Payment (Annex G)

- c. List of on-going government and private contracts including contracts already awarded but not yet started. Cost must be in Philippine Pesos computed on the date of the signing of the contract.

Name of Firm/Company : _____

Contract Name	Location	Name of Client	Contract Date (mm/dd/yy)		Cost of Consultancy Contract	% Participation	Primary or Associate Firm <u>P or A</u>	Category of Service Rendered
			Start	Actual Completion				
1.								
2.								
3.								
4.								
5.								
6.								
7.								
8.								
9.								
10.								

Category of Services Rendered: A – Advisory and Review Services, P – Pre-Investment or Feasibility Studies, D – Detailed Design, C – Construction Supervision, O – Other Technical Services or Special Studies

Note: Attach certified copy of Notice of Award and/or Notice to Proceed issued by the Client (Annex H)

E.2.2 Project Profile (complete a separate form for the Primary Firm and each Associate Firm for all projects listed in Section E.2.1)

Name of Firm/Company : _____

Project Name:		Country:
Location within Country:		Professional Staff Provided by Your Firm/Entity:
Name of Client:		No. of Staff:
Address:		No. of Staff-Months; Duration of Project:
Start Date (Month/Year):	Completion Date (Month/Year):	Total Project Costs (in PhP): Approx. Value of Services (in PhP):
Name of Associated Consultants, if any:		No. of Months of Professional Staff Provided by Associated Consultants:
Name of Senior Staff (Project Director/Coordinator, Team Leader) Involved and Functions Performed:		
Narrative Description of Project:		
Description of Actual Services Provided/Being Provided by Your Staff:		

E.2.3 Statement On Citizenship & Professional Registration

Date of Issuance

PATRICK LESTER N. TY

Chief Regulator
MWSS Regulatory Office
Katipunan Road, Balara, Quezon City

Attention : **Lee Robert M. Britanico**
Chairperson, MWSS RO Bids and Awards Committee

Dear Sir/Madame:

In compliance with the requirements of the MWSS Regulatory Office BAC for the bidding of the Consultancy Services for the Customer Satisfaction Survey – Contract No. RO-CS2021-001, I hereby certify that:

- I am (Nationality) citizen wishing to participate in the bidding.
- I have the technical and financial capabilities to satisfactorily render the required services.

I certify further that all of the owners/principals/partners and key staff of _____ (Name of the Bidder) possess the required professional licenses issued by the Professional Regulation Commission or other appropriate regulatory body.

Very truly yours,

Name and Signature of Authorized Representative

Position

Name of the Bidder

E.3 Financial Document (complete a separate form for the Primary and each Associate Firm)

Name of Firm/Company : _____

Summary of the Consultant’s audited financial statements, showing, among others, the Consultant’s total and current assets and liabilities, stamped “RECEIVED” by the Bureau of Internal Revenue (BIR) or its duly accredited and authorized institutions, for the preceding calendar year which should not be earlier than two (2) years from the date of bid submission.

		Year 20__
1.	Total Assets	
2.	Current Assets	
3.	Total Liabilities	
4.	Current Liabilities	
5.	Net Worth (1-3)	
	Net Working Capital (2-4)	

Annual volume of gross fees for the last five (5) years in Philippine Pesos

- Year 20__ : _____
- Year 20__ : _____
- Year 20__ : _____
- Year 20__ : _____
- Year 20__ : _____

Bank Information

Name of Bank and Branch	Present Credit Line Amount	Effective Period	
		From (mm/dd/yy)	To (mm/dd/yy)

Submitted by:

Name and Signature of Authorized Representative

Position

Date : _____

Note: Attach latest audited Financial Statement stamped received by the BIR (Annex I)

E. CLASS “B” DOCUMENTARY REQUIREMENTS

F.1 Valid Joint Venture Agreement (JVA)

KNOW ALL MEN BY THESE PRESENTS:

That this JOINT VENTURE AGREEMENT is entered into By and Between _____, of legal age, _____ (*civil status*), owner/proprietor of _____ and a resident of _____.

- and -

of _____, of legal age, _____ (*civil status*) owner/proprietor of _____ a resident of _____.

That both parties agree to join together their manpower, equipment, and what is needed to facilitate the Joint Venture to participate in the Eligibility, Bidding and Undertaking of the here-under stated project to be conducted by the MWSS Regulatory Office.

NAME OF PROJECT

CONTRACT AMOUNT

That both parties agree to be jointly and severally liable for the entire assignment.

That both parties agree that _____ and/or _____ shall be the Official Representative of the Joint Venture, and is granted full power and authority to do, execute and perform any and all acts necessary and/or to represent the Joint Venture in the bidding as fully and effectively and the Joint Venture may do and if personally present with full power of substitution and revocation.

That this Joint Venture Agreement shall remain in effect only for the above stated Project until terminated by both parties.

Done this _____ day of _____, in the year of our Lord _____.

WITNESSES

ACKNOWLEDGEMENT

BEFORE ME, A Notarial Public in and for _____, this _____ day of _____ personally appeared the following:

NAME: _____ Community Tax Certificate No: _____
Issued on: _____
Issued at: _____

NAME: _____ Community Tax Certificate No: _____
Issued on: _____
Issued at: _____

Known to me to be the same person who executed the foregoing instrument acknowledge the same to their own free and voluntary act and deed as well as that of the entity/corporations herein represented.

WITNESS MY HAND AND NOTARIAL SEAL on the date and place above written.

NOTARY PUBLIC

Until _____
PTR No. _____
Date _____
Place _____
TIN _____

Doc. No.: _____
Page No.: _____
Book No.: _____
Series of _____

INSTRUCTIONS

- 1.0 The Applicant shall accomplish/answer all items in the Application using the English language. Answers must be given to all questions in the aforesaid statement. All blanks shall be properly filled up. If necessary, additional sheets may be added to the form or if the form has limited space, it can be reproduced and enlarged to suit the Applicant's needs. Documents submitted on forms or in any format other than that prescribed in the aforesaid Statement shall be considered non-complying and will be rejected outright. Forms that may require attachments shall be clearly marked, and provided with "dog ear", i.e., Annex A, Annex B, etc.
- 2.0 The information/data submitted by the interested Firm/Company are to be used by the MWSS-RO in determining, according to its judgement and discretion, the eligibility and qualification of prospective Firm/Company. In view thereof, the interested Firm/Company is encouraged to communicate with the MWSS-RO for any clarification or interpretations on the documents as request for reconsideration will not be entertained on any erroneous interpretations or conclusions made by the Applicant. An interested Firm/Company submitting its qualifications as prospective Firm/Company for review and consideration waives any claim against any decision thereon. The signing by the Firm/Company or his duly authorized representative of the Registry Application Statement acknowledges the truth and correctness of all statements made thereon; otherwise, the Firm/Company shall be liable for perjury as provided in the Revised Penal Code.
- 3.0 The following documents shall, among others, comprise the Consultant's Application for Eligibility:

General Information

Annex A: Original copy of the appointment/designation of the Authorized Person to sign and submit application for eligibility from the Owner/Governing Board of the firm with specimen signature and photographs (2x2). If Corporation, it should be in the form of a Board Resolution certified by the Board Secretary.

Annex B: PhilGEPS Registration and Membership

Annex C: Prospective Bidder's certified copy of valid Certificate of Registration of Business Name from the Department of Trade and Industry (DTI), if Sole Proprietor, or;

Prospective Bidder's certified copy of Certificate of Registration from the Securities and Exchange Commission (SEC), if Partnership or Corporation or Foreign Consultant, or;

Prospective Bidder's certified copy of Registration from Cooperative Development Authority (CDA), if Cooperative.

Annex D: Prospective Bidder's certified copy of Deed or Articles of Partnership, if Partnership, or;

Prospective Bidder's certified copy of Articles of Incorporation, if Corporation.

Annex E: Prospective Bidder's certified copy of valid and current Mayor's permit.

Annex F: Tax Clearance

Annex G: Prospective Bidder's certified copy of Certificate of Satisfactory Completion issued by the Client and/or Document/Receipt indicating proof of final payment (attachment to Sections E.2.1.a. and E.2.1.b)

Annex H: Prospective Bidder's certified copy of Notice of Award and/or Contract and Notice to Proceed issued by the Client (attachment to Section E.2.1.c.)

Annex I: Latest audited Financial Statement stamped "RECEIVED" by the BIR or its duly authorized agents (attachment to Item E.3)

4.0 Each page of the annexes, attachments and other supporting documents shall be marked in the right top corner, i.e. Annex A, page 1 of 5; Annex A page 2 of 5; etc, as the case may be.

5.0 The MWSS-RO reserves the right to accept or reject any application without any liability to the affected applicants or any obligation to inform the applicants of the grounds for the action taken thereon.

6.0 Definitions and terms

Acronym

Abbreviation of the firm/company's name.

Annual volume of gross fees

The gross annual fees earned by the firm for the previous five (5) years.

Associate Firms

Information about firms/companies joining with the primary firm/company listed in Section B for purposes of eligibility application for the contract in question.

Category of Service Rendered

The nature of service rendered whether A-Advisory and Review Services, P-Pre-Investment or Feasibility Studies, D-Detailed Design, C-Construction Supervision, O-Other Technical Services or Special Studies

Name of Client

The name of the client firm.

Consultant's On-Going and Awarded Contracts

A list of all on-going contracts including private contracts already awarded but not yet started.

Consultant's Comparable Work Experience

A list of the firm's most comparable contracts (maximum of 5 for all firms combined) successfully completed by the firm/company for the last 10 years. "Comparable" means consulting services of size, complexity and technical specialty, comparable to the job under consideration including quality of performance.

Consultant's Related Work Experience

A list of the most related contracts (maximum of 5 for all firms combined) successfully completed by the firm/company for the last 10 years. "Related" means consulting services related to the job under consideration.

Contact Person 1

The name, designation and telephone number of an employee who can answer questions concerning the application statement.

Contact Person 2

The name, designation and telephone number of an additional employee who can answer questions concerning the application statement.

Contract Date Actual Completion

The month, day, year of the contract's actual completion.

Contract Date Start

The month, day, year the contract started.

Contract Name

The name of each contract listed.

Cost of Consultancy Contract

The cost in Philippine Peso of the consultancy contract computed on the date of the contract signing.

Date Degree Awarded

The month, day and year the degree was awarded to the employee.

Date of Assignment

The month, day and year when the employee began working on the contract and the month, day and year when the employee finished working in the contract.

Degrees

A list of all degrees earned by the employee.

Description of Project

A narrative description of the project giving a summary explanation of the size, purpose, objectives and benefits of the project.

Description of Actual Services Provided/Being Provided

A narrative description of the work done for the contract assignment. It is very important to complete this item thoroughly and in detail. Descriptions should be detailed and specific with regard to what was done and how it was done.

Email Address

The email address of the head office.

Estimated Completion

The month, day and year the contract is scheduled to be complete.

Experience

This section must be completed for the primary firm and all associate firms listed in Section B.

Fax Number

The fax number of the head office.

Former Names of the Firm/Company

A list of all names the firm has previously used in conducting business.

Main Office Address

The address of the firm/company's head office.

Institution

The name of the institution where the degree was earned.

Key Staff Assigned

The name, identification number and assignment dates for each employee assigned to the contract.

Location

The name of the location where the contract took place.

Name of Associate Firm/Company

The associate consultant firm name.

Name of Primary Firm/Company

The firm name of the primary consultant submitting the application.

Names of Key Personnel that May Be Assigned

The names of key personnel of the firm/company that will possibly be appointed for the particular contract in question.

Names of Owners/Stockholders/Partners

The names of all persons who have ownership in the firm/company.

Nationality

The name of the country of citizenship for the person concerned.

Number of Administrative Staff

The number of administrative staff employed by the firm/company.

Number of Key Technical Personnel by Professional Category

The number of principal technical personnel employed by the firm/company categorized by professional category.

Number of Technical Support Personnel by Professional Category

The number of technical support personnel employed by the firm/company categorized by professional category.

Percentage Participation

The firm's percent participation in the contract in the case of associate firms working together on the contract based on cost.

Primary or Associate Firm

For the listed contract indicate if the firm/company was the prime consultant or the associate consultant.

Professional Category

The nature or professional expertise of each employee listed using the categories listed in items “a” and “b” under Section D.

Tax ID Number/PRC Number/Passport Number

A unique number identifier for each name listed.

Telephone Number

The telephone number of the head office.

Type of Organization

The category that describes the ownership of the firm/company.

Work Experience

The list of contract/employment the employee has been assigned.

Year Established

The year the firm/company was established.

Years with Firm

The number of years the employee has worked for the firm.

