

# **PHILIPPINE BIDDING DOCUMENTS**

ELIGIBILITY DOCUMENTS

## **Procurement of CONSULTING SERVICES**

for the

### **COMPREHENSIVE REVIEW OF TARIFF SETTING METHODOLOGY OF LOCAL AND FOREIGN UTILITIES**

Contract No. RO-CS2025-002

Government of the Republic of the Philippines

**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 12009 (R.A. 12009).

The Bidding Documents shall clearly and adequately define, among others: (a) the objectives, scope, and expected outputs and/or results of the proposed contract; (b) the 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**



## **Request for Expression of Interest for Consulting Services for the Comprehensive Review of Tariff Setting Methodology of Local and Foreign Utilities**

1. The Metropolitan Waterworks and Sewerage System Regulatory Office (MWSS RO) through its Corporate Operating Budget for FY2025 intends to apply the sum of **NINETEEN MILLION PESOS (Php19,000,000.00)** being the Approved Budget for the Contract (ABC) to payments under the contract for Consulting Services for the Comprehensive Review of Tariff Setting Methodology of Local and Foreign Utilities (Contract No. RO-CS2025-002). 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 to conduct a comprehensive review of rate setting and adjustment mechanisms implemented by local and international utilities, including but not limited to the performance-based regulation (PBR combined with the Regulatory Asset Base. The Consultant shall compare the Concession Pricing Model (CPM) with other rate setting approaches, identify advantages and disadvantages, evaluate applicability to the MWSS Concessionaires, and implications with the Revised Concession Agreements (RCA) and IRRs.

Eligibility documents of interested consultants **must be duly received by the BAC Secretariat on or before 18 July 2025, 11:00 AM** at Lot 2, MWSS Compound, Katipunan Ave., corner H. Ventura Street, Brgy. Pansol, District 3, Quezon City. The date and time of **opening of eligibility documents is 18 July 2025, 2:00 PM** at Lot 2, MWSS Compound, Katipunan Ave., corner H. Ventura Street, Brgy. Pansol, District 3, Quezon City.

Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion.

3. Interested bidders may obtain further information from MWSS RO and inspect the Bidding Documents at the address given below from **8:00 AM to 4:00 PM**.

4. A complete set of Eligibility Documents may be acquired by interested Bidders on **11 July 2025** from the address below and upon payment of the applicable fee, pursuant to the latest Guidelines issued by the GPPB, in the amount of **FIVE THOUSAND PESOS (Php 5,000.00)**. It may also be downloaded free of charge from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the website of the Procuring Entity, provided that Bidders shall pay the applicable fee for the Eligibility 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 No. 12009 (RA 12009), otherwise known as the “New Government Procurement Act”, and its Implementing Rules and Regulations (IRR). The short list shall consist of **five (5)** prospective bidders who will be entitled to submit bids. Should only one (1) or less than the required in the number apply for

eligibility and short-listing, pass the eligibility check, and/or pass the minimum score required for the short-listing, the BAC shall consider the same. The criteria and rating system for short listing are:

<b>Criteria</b>	<b>Rating</b>
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 12009. Bidding is restricted to Filipino citizens/sole proprietorships, cooperatives, and partnerships or organizations with at least sixty percent (60%) interest or outstanding capital stock belonging to citizens of the Philippines. Please see Section VII and VIII of the Terms and Reference for the Qualifications and Limitations of the Firm and Key Personnel and Constraints.

7. The Procuring Entity shall evaluate bids using the **Quality Based Evaluation/Selection (QBE/QBS) procedure**. 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 a period of one hundred eighty (180) days after the issuance of the Notice to Proceed (NTP). In the event that there will be changes in the current rate setting methodology, the Consultant shall continue to provide comprehensive support to the MWSS in securing the required approvals from all relevant agencies.

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 70 of RA 12009 and its IRR, without thereby incurring any liability to the affected bidder or bidders.

10. For further information, please refer to:

**ATTY. CRESCENCIANO B. MINAS, JR.**

MWSS RO Bids and Awards Committee

Address: Lot 2, MWSS Compound, Katipunan Ave., corner H. Ventura Street, Brgy. Pansol, District 3, Quezon City

Email: [ranjev.garcia@ro.mwss.gov.ph](mailto:ranjev.garcia@ro.mwss.gov.ph)

Website: <https://ro.mwss.gov.ph/>

11 July 2025

**ATTY. CRESCENCIANO B. MINAS, JR. (SGD.)**

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 52.1 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 52.3 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 52.2 of the IRR of RA 12009.

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

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

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

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

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

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

- 4.1. Prospective bidders shall enclose their original eligibility documents described in Clause 2.1, in a sealed envelope marked "ORIGINAL – ELIGIBILITY DOCUMENTS". Each copy thereof shall be similarly sealed duly marking the envelopes as "COPY NO. \_\_\_\_ - ELIGIBILITY DOCUMENTS". These envelopes containing the original and the copies shall then be enclosed in one single envelope.
- 4.2. The original and the number of copies of the eligibility documents as indicated in the **EDS** shall be typed or written in ink and shall be signed by the prospective bidder or its duly authorized representative/s.
- 4.3. All envelopes shall:
  - (c) contain the name of the contract to be bid in capital letters;
  - (d) bear the name and address of the prospective bidder in capital letters;
  - (e) be addressed to the Procuring Entity's BAC specified in the **EDS**;
  - (f) bear the specific identification of this Project indicated in the **EDS**; and

- (g) bear a warning “DO NOT OPEN BEFORE...” the date and time for the opening of eligibility documents, in accordance with Clause 5.

4.4 Eligibility documents that are not properly sealed and marked, as required in the bidding documents, shall not be rejected, but the bidder or its duly authorized representative shall acknowledge such condition of the documents as submitted. The BAC shall assume no responsibility for the misplacement of the contents of the improperly sealed or marked eligibility documents, or for its premature opening.

## **5. Deadline for Submission of Eligibility Documents**

Eligibility documents must be received by the Procuring Entity’s BAC at the address and on or before the date and time indicated in the Request for Expression of Interest and the EDS.

## **6. Late Submission of Eligibility Documents**

Any eligibility documents submitted after the deadline for submission and receipt prescribed in Clause 0 shall be declared “Late” and shall not be accepted by the Procuring Entity. The BAC shall record in the minutes of submission and opening of eligibility documents, the Bidder’s name, its representative and the time the eligibility documents were submitted late.

## **7. Modification and Withdrawal of Eligibility Documents**

- 7.1. The prospective bidder may modify its eligibility documents after it has been submitted; provided that the modification is received by the Procuring Entity prior to the deadline specified in Clause 5. The prospective bidder shall not be allowed to retrieve its original eligibility documents, but shall be allowed to submit another set equally sealed, properly identified, linked to its original bid marked as “ELIGIBILITY MODIFICATION” and stamped “received” by the BAC. Modifications received after the applicable deadline shall not be considered and shall be returned to the prospective bidder unopened.
- 7.2. A prospective bidder may, through a letter of withdrawal, withdraw its eligibility documents after it has been submitted, for valid and justifiable reason; provided that the letter of withdrawal is received by the Procuring Entity prior to the deadline prescribed for submission and receipt of eligibility documents.
- 7.3. Eligibility documents requested to be withdrawn in accordance with this Clause shall be returned unopened to the prospective bidder concerned. A prospective bidder that withdraws its eligibility documents shall not be permitted to submit another set, directly or indirectly, for the same project. A prospective bidder that acquired the eligibility documents may also express its intention not to participate in the bidding through a letter which should reach and be stamped by the BAC before the deadline for submission and receipt of eligibility documents.

## **8. Opening and Preliminary Examination of Eligibility Documents**

- 8.1. The BAC will open the envelopes containing the eligibility documents in the presence of the prospective bidders' representatives who choose to attend, at the time, on the date, and at the place specified in the **EDS**. The prospective bidders' representatives who are present shall sign a register evidencing their attendance.

In case the submitted eligibility envelopes cannot be opened as scheduled due to justifiable reasons, the BAC shall take custody of the said envelopes and reschedule the opening on the next working day or at the soonest possible time through the issuance of a Notice of Postponement to be posted in the PhilGEPS website and the website of the Procuring Entity concerned.

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

- 8.3. The eligibility documents envelopes and modifications, if any, shall be opened one at a time, and the following read out and recorded:

- (h) the name of the prospective bidder;
- (i) whether there is a modification or substitution; and
- (j) the presence or absence of each document comprising the eligibility documents vis-à-vis a checklist of the required documents.

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

## **9. Short Listing of Consultants**

- 9.1. Only prospective bidders whose submitted contracts are similar in nature and complexity to the contract to be bid as provided in the **EDS** shall be considered for short listing.

- 9.2. The BAC shall draw up the short list of prospective bidders from those declared eligible using the detailed set of criteria and rating system to be used specified in the **EDS**.
- 9.3. Short listed consultants shall be invited to participate in the bidding for this project through a Notice of Eligibility and Short Listing issued by the BAC.

## **10. Protest Mechanism**

Decision of the Procuring Entity at any stage of the procurement process may be questioned in accordance with Section 83 of the IRR of RA 12009.

## **Section III. Eligibility Data Sheet**



# Eligibility Data Sheet

Eligibility Documents	
1.2	The Consulting Services involves a comprehensive review of rate setting and adjustment mechanisms implemented by local and international utilities, including but not limited to the PBR combined with the RAB. Key staff who will actually perform the work shall be registered professionals by the Philippine Regulation Commission (PRC), Supreme Court, and/or other appropriate regulatory body.
1.3	No further instructions.
2.1(a)(ii)	The statement of all ongoing and completed government and private contracts shall include all such contracts in the <b>past ten (10)</b> years prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	Certificate of Satisfactory Completion issued by the Client and/or document or receipt indicating proof of Final Payment will be accepted for a completed contract to be considered.
4.2	<p>Each prospective bidder shall submit one (1) original hard copy and one (1) electronic copy stored on a flash drive of its eligibility documents.</p> <p>Each hard copy must be properly labeled, bound, and tabbed for easy reference. Moreover, all pages of documents submitted must be numbered.</p> <p>However, non-submission of the electronic copy and non-compliance with the labeling, binding, and tabbing, and page numbering requirement shall not be grounds for disqualification.</p>
4.3(e)	<p><b>ATTY. CRESCENCIANO B. MINAS, JR.</b>  MWSS RO Bids and Awards Committee  Address: Lot 2, MWSS Compound, Katipunan Ave., corner H. Ventura Street, Brgy. Pansol, District 3, Quezon City  Email: <a href="mailto:ranjev.garcia@ro.mwss.gov.ph">ranjev.garcia@ro.mwss.gov.ph</a>  Website: <a href="https://ro.mwss.gov.ph">https://ro.mwss.gov.ph</a> /</p>
4.3(f)	Consulting Services for the Comprehensive Review of Tariff Setting Methodology of Local and Foreign Utilities (Contract No. RO-CS2025-002)
5	<p>The address for submission of eligibility documents is <b>Lot 2, MWSS Compound, Katipunan Ave., corner H. Ventura Street, Brgy. Pansol, District 3, Quezon City.</b></p> <p>The deadline for submission of eligibility documents is <b>18 July 2025, 11:00 AM.</b></p>

8	<p>The place of opening of eligibility documents is <b>Lot 2, MWSS Compound, Katipunan Ave., corner H. Ventura Street, Brgy. Pansol, District 3, Quezon City.</b></p> <p>The date and time of opening of eligibility documents is <b>18 July 2025, 2:00 PM at Lot 2, MWSS Compound, Katipunan Ave., corner H. Ventura Street, Brgy. Pansol, District 3, Quezon City.</b></p>																								
9.1	<p>Similar contracts shall refer to:</p> <p>a. Financial planning and rate/price determination and structuring and/or financial audit for large infrastructure projects/companies/entities, preferably in water, sewerage, and power; and</p> <p>b. Financial Audit for rate setting and/or due diligence audit required for enterprise valuation such as mergers and acquisition of companies with large infrastructure projects, preferably in the water, sewerage, and power sector.</p>																								
9.2	<p>The criteria and rating system for shortlisting are the following:</p> <table> <tr> <th><u>Criteria</u></th><th><u>Rating</u></th></tr> <tr> <td><b>I. Applicable Experience</b></td><td><b>50 points</b></td></tr> <tr> <td>Completed consulting services of size, complexity and technical specialty to the contract to be bid</td><td>40 points</td></tr> <tr> <td>Other completed consulting services related to the contract under consideration</td><td>10 points</td></tr> <tr> <td><b>II. Quality of Staff that may be Assigned</b></td><td><b>30 points</b></td></tr> <tr> <td>Key Staff Education</td><td>6 points</td></tr> <tr> <td>Key Staff Experience</td><td>24 points</td></tr> <tr> <td><b>III. Current Workload Relative to Capacity</b></td><td><b>20 points</b></td></tr> <tr> <td>No. of Technical Personnel</td><td>5 points</td></tr> <tr> <td>Firm's Productivity</td><td>5 points</td></tr> <tr> <td>Personnel Workload</td><td>5 points</td></tr> <tr> <td>Firm's Workload</td><td>5 points</td></tr> </table>	<u>Criteria</u>	<u>Rating</u>	<b>I. Applicable Experience</b>	<b>50 points</b>	Completed consulting services of size, complexity and technical specialty to the contract to be bid	40 points	Other completed consulting services related to the contract under consideration	10 points	<b>II. Quality of Staff that may be Assigned</b>	<b>30 points</b>	Key Staff Education	6 points	Key Staff Experience	24 points	<b>III. Current Workload Relative to Capacity</b>	<b>20 points</b>	No. of Technical Personnel	5 points	Firm's Productivity	5 points	Personnel Workload	5 points	Firm's Workload	5 points
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## **Section IV. Consultant's Confidential Application for Eligibility**

## CONSULTANT'S CONFIDENTIAL APPLICATION FOR ELIGIBILITY

Consulting Services for the Comprehensive Review of Tariff Setting Methodology of  
Local and Foreign Utilities (Contract No. RO-CS2025-002)

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

**ATTY. CRESCENCIANO B. MINAS, JR.**  
**MWSS RO Bids and Awards Committee**

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 \_\_\_\_\_, 2025 at \_\_\_\_\_, Philippines.

\_\_\_\_\_  
AFFIANT

SUBSCRIBED AND SWORN TO before me this \_\_\_\_ day of \_\_\_\_\_, 2025, 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. GENERAL INFORMATION

### 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 : \_\_\_\_\_

## B. 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

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

Name of Firm/Company: \_\_\_\_\_

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

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

Name of Consultant : \_\_\_\_\_

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

<b>a. Number of Key Technical Personnel by Professional Category:</b>		<b>b. Number of Technical Support Personnel by Professional Category:</b>		
1. Economist:		1. Economist:		
2. Accountant:		2. Accountant:		
3. Financial Modeler:		3. Financial Modeler:		
4. Lawyer:		4. Lawyer:		
5. Others (specify):		5. Others (specify):		
		<b>c. Number of Administrative Staff:</b>		
<b>TOTAL NO. OF PERSONNEL: (a+b+c)</b>				
<b>d. a. Proposed Position / Names of Professional Staff that may be Assigned to this Project (Number of Staff)</b>	<b>Tax ID No.*/PRC No.*/Passport No.** * Local ** Foreign</b>	<b>Professional Category</b>	<b>Status*</b>	<b>Nationality</b>
Project Manager / Economist (1)				
Financial Expert (1)				
Financial Modeler (1)				
Legal Adviser (1)				

**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 fifteen (15) years, give name and length of service with previous employers for a fifteen (15)-year period (attached additional sheet/s), if necessary:

Name and Address of Employer

Length of Service

_____	_____ 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).

## **E. CLASS “A” DOCUMENTARY REQUIREMENTS**

### ***E.1 Legal Documents***

#### **E.1.1 Registration/Licenses**

	<b>Registration/ License #</b>	<b>Place of Registration</b>	<b>Date of Reg. (mm/dd/yy)</b>	<b>Expiration Date (mm/dd/yy)</b>
DTI Business Name Registration (if sole proprietorship)				
SEC (if partnership or corporation) Certificate				
CDA Registration Certificate (for Cooperatives)				
Valid and Current MAYOR’S Permit				

#### **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	% Partici pation	Primary or Associate Firm <u>P or A</u>	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*

- 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	% Participa tion	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*

- c. List of ongoing 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	% Participa tion	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 E)*

**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 : **ATTY. CRESCENCIANO B. MINAS, JR.**  
MWSS RO Bids and Awards Committee (BAC)

Dear Atty. Minas:

In compliance with the requirements of the MWSS RO BAC for the bidding of the Consulting Services for the Comprehensive Review of Tariff Setting Methodology of Local and Foreign Utilities (Contract No. RO-CS2025-002), 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 Date mm/dd/yy	To Date 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 F)*



## F. 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 judgment 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**

- |                 |  |
|-----------------|--|
| <b>Annex A:</b> | 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.  |
| <b>Annex B:</b> | <p>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;</p> <p>Prospective Bidder's certified copy of Certificate of Registration from the Securities and Exchange Commission (SEC), if Partnership or Corporation or Foreign Consultant, or;</p> <p>Prospective Bidder's certified copy of Registration from Cooperative Development Authority (CDA), if Cooperative.</p> |
| <b>Annex C:</b> | 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 D:** Prospective Bidder's certified copy of valid and current Mayor's permit.

**Annex E:** 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 F:** 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 10 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