



**REPUBLIC OF THE PHILIPPINES**  
**DEPARTMENT OF TRADE AND INDUSTRY**  
**Bids and Awards Committee**  
**(Bidding No. 21-031)**

**Request for Proposal for Negotiated Procurement**  
**Consulting Service for the Crafting of the Philippine Export Development Plan 2022-**  
**2027**

1. In view of the two (2) failed public biddings, the Department of Trade and Industry (DTI) Bids and Awards Committee (BAC) invites interested bidders to submit proposal in the negotiation for the **Consulting Service for the Crafting of the Philippine Export Development Plan 2022-2027** with an Approved Budget for the Contract (ABC) of **Twelve Million Pesos (PhP12,000,000.00)** in accordance with Section 53.1 of the Implementing Rules and Regulations of Republic Act No. 9184, otherwise known as the "Government Procurement Reform Act."

For more details on this project, please refer to attached Terms of Reference (Annex A).

2. Negotiated Conference will be on **06 September 2021, 9:30 AM** through video conferencing, which shall be open to all prospective bidders. The Zoom Meeting Details are:

**Zoom Meeting Details:**

<https://zoom.us/j/97174407295?pwd=SmxuUEg0ZW9ES2NBOFUxV1hxaVg2QT09>

Meeting ID: 971 7440 7295  
Passcode: 606903

3. The Eligibility documents, Technical Proposal Forms (Annex B) and Financial Proposal Form (Annex C) shall be submitted in a separate envelope on or before **13 September 2021, 9:00 AM** through video conferencing or webcasting via Zoom, which shall be open to prospective bidders.
4. Opening of the eligibility documents and technical proposal will be on **13 September 2021, 9:30 AM** and the opening of the financial proposal will be on **20 September 2021, 9:30 AM** at the Center Conference Room, Trade & Industry Building, 361 Sen. Gil Puyat Avenue, Makati City.

The Zoom Meeting Details for 13 September 2021:

<https://zoom.us/j/92389350826?pwd=Ml9hTmVhVTZGY0ZxbHBGUUx0MCsvUT09>

Meeting ID: 923 8935 0826  
Passcode: 847590

The Zoom Meeting Details for 20 September 2021:

<https://zoom.us/j/92358282005?pwd=ZG5GY0ZKSGVaWExSR1BYUFcyejNrQT09>

Meeting ID: 923 5828 2005  
Passcode: 944650

5. The bidders may submit their bids in any of the following form:
  - 5.1. Physical submission of the documents on the address stated below; or
  - 5.2. Electronic submission of bids with the following guidelines:
    - 5.2.1. The Bidder shall submit three (3) set of files of the same documents in PDF format, NOT EDITABLE, with different individual password before the set deadline. The Encryption Key and Password shall be submitted during the opening of the bids of the concerned bidder.
    - 5.2.2. The Bidder shall have the full responsibility on securing the files submitted are not corrupted. The DTI-BAC shall have three (3) attempts to open the submitted files.
      - If the first file was successfully opened, the two (2) remaining files shall be disregarded.
      - If the first file was corrupted, the DTI-BAC shall open the second file. If the second file was successfully opened, the first and third file shall be disregarded.
      - If the first and second file were corrupted, the third file shall be opened.
6. If the third file was corrupted, the bidder shall be automatically disqualified.
7. The DTI reserves the right to accept or reject any offer, to annul the negotiation process, and to reject all offers at any time prior to contract award, without thereby incurring any liability to affected firms.
8. For further information, please refer to:

**Mary Ann D. Yulas**

Assistant Chief, Procurement Management Division  
Human Resource and Administrative Service  
Department of Trade and Industry  
G/F, Trade and Industry Building  
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Tel. No: +63 (2) 7791-3363/3367, Fax No: +63 (2) 895-3515  
Email: [MaryAnnYulas@dti.gov.ph](mailto:MaryAnnYulas@dti.gov.ph)  
Website: [www.dti.gov.ph](http://www.dti.gov.ph)

You may visit the following websites:

For downloading of Bidding Documents:

<https://notices.philgeps.gov.ph/>

<https://www.dti.gov.ph/good-governance-program/transparency-seal/bac-resources/>

For online bid submission: [BACSecretariat@dti.gov.ph](mailto:BACSecretariat@dti.gov.ph)

*SGD.*

**MARY JEAN T. PACHECO**  
Assistant Secretary  
Chairperson  
DTI-Bids and Awards Committee

## **List of Eligibility Documents**

(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 five (5) years, and completed government and private contracts within two (2) years. 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 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.

- (iv) Original duly signed Omnibus Sworn Statement (OSS) (Annex D), and Original Notarized Secretary’s Certificate in case of a corporation, partnership, or cooperative; or Original Special Power of Attorney of all members of the joint venture giving full power and authority to its officer to sign the OSS and do acts to represent the Bidder.

(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.

## Annex A

# Terms of Reference

## Crafting of the Philippine Export Development Plan 2022-2027

### 1. GENERAL INFORMATION

#### BACKGROUND:

Pursuant to Article II, Section 5 of Republic Act 7844 or the Export Development Act of 1994, *“The President of the Republic of the Philippines shall approve a rolling three-year Philippine Export Development Plan prepared by the Department of Trade and Industry (DTI) which shall form part of the medium-term Philippine Development Plan (MTPDP). It shall be formulated in consultation with the private sector, validated and updated semestrally”*.

Section 7 (a) of RA 7844, stipulates that the Export Development Council (EDC) shall *“approve the PEDP; coordinate, monitor and assess the implementation thereof, and when necessary, institute appropriate adjustments thereon in the light of changing conditions in both the domestic and international environment”*

The PEDP shall define the country's medium-term and annual export thrusts, strategies, programs and projects and shall be jointly implemented by the government, exporters and other concerned sectors. Consistent with the Implementing Rules and Regulations (IRR) of RA 7844, the DTI leads in the formulation of the PEDP in consultation with the private sector.

Given the previous Plan's alignment with the implementation cycle of the Philippine Development Plan (PDP), formerly the Medium-Term Philippine Development Plan (MTDP), the proposed PEDP updating will cover the period 2022-2027.

### 2. OBJECTIVES

There have been 8 Philippine Export Development Plans (PEDPs) prepared in the past, each one for a specific time period: 1994-1998, 1999-2001, 2002-2004, 2005-2007, 2008-2010, 2011-2013, 2015-2017, and 2018-2022.

The present PEDP 2018-2022 needs to be revised to directly address the impact of the COVID-19 pandemic on Philippine export performance in 2020 since it has created severe disruptions in the global value chain. The New PEDP shall cover the period 2022-2027 and will forcefully address recurring and ever-present policy issues and challenges, inward-looking and restrictive trade rules from major trade partners, impact of industry 4.0 and data as the new commodity. It will be aligned with the PDP overall targets and strategies, public investment programs that will continue the advocacy of innovation and competitiveness; and the significant role of harmonized national, regional and local government policies and programs in export development and promotion.

Specifically, the crafting of the PEDP aims to achieve the following through deeper engagement with key stakeholders from the public and private sectors and from the

academe.

#### **A. Data Analytics Objectives**

- a) Establish the global outlook for the Philippine exporting industry through assessment of the identified priority export sectors and priority markets particularly those with preferential trade agreements through complete and comprehensive data analytics from descriptive, diagnostic, predictive to prescriptive;
- b) Identify export priority sectors and markets through sectoral, global value chain impact and export capability analytics;
- c) Identify emerging products and markets by analysing products with economic complexity and export potential;
- d) Set annual export targets and projections (total PH exports and sectoral) for periodical assessment.

#### **B. Policy Objectives:**

- a) Review of existing trade regulatory frameworks and procedures affecting the identified priority sectors and markets;
- b) Provide a legal basis for policy shift to support and strengthen exports.
- c) Link export growth to national competitiveness efforts (e.g. Inclusive Innovation Industrial Strategy (I<sup>3</sup>S), Industry 4.0, Philippine Innovation Act (PIA), Innovative Start-up Act (ISA));

#### **C. Strategy Objectives:**

- a) Formulate enhanced and focused export strategies and action plans, specifically, new directions in export promotions by integrating a cohesive product and market strategy and linking industry development, innovation and investments;
- b) Develop stronger and wider multi-sectoral partnerships from relevant government agencies and private sectors through focused regional stakeholders' consultations, focused group discussions, seminars and information sessions.

#### **D. Action Objectives**

- a) Link strategy to specific action plan per sector (industry, products and markets) with sufficient budgetary provisions.

### **3. SCOPE OF WORK AND DELIVERABLES**

The Scope of Work and Deliverables for PEDP is composed of the following specific activities:

#### **A. Review of the Existing Previous Plan**

## Gap Analysis

1. Review the existing plan and identify the major determinants both internal and external factors such as trade policies and regulations, incentive programs, market access, product complexities, position in the global value chain and digitalization among others that drive or hinder export growth and competitiveness;
2. Identify the gaps in the existing plan such as the lack of sectoral analysis, targets and strategies; product, industry and market specific policies and strategies; product- market matching; and, action plans and budget.

## Trade Facilitation Concerns

3. *Review current international and regional trading arrangements such as bilateral and multilateral free trade agreements (FTAs) and generalized system of preferences (GSPs) and their impact on market opportunities and market access for Philippine exports;*
4. *Recommend on the clarification, delineation and harmonization of the roles and functions of export promotion and trade facilitation agencies and projects as well as various on-going trade promotion programmes of trade-related government agencies;*

## Organizational Concerns

5. *Review DTI Organization: overlaps, interconnectivity and collaboration;*
6. *Review the Export Development Council (EDC): mandate and composition.*

## B. Monitoring and Evaluation

1. Develop a robust **PEDP implementation Monitoring and Evaluation (M&E)** system
2. Improve Trade in Value-added (TIVA) Statistics
3. Design a methodology in the conduct of regular exporters' expectations' survey

## 4. **EXPECTED OUTPUTS**

The expected outputs arising from the implementation of the specific activities defined above are the following:

### A. Review of PDP and PEDP Targets and their Bases, and new PEDP

1. Complete data analytics on export performance: Goods and Services (aggregated and by sub-groups product, industry or sector);
2. Projected exports of goods and services for 2022-2024 based on the export model in the updated framework and alternative scenarios;
3. Alternative projections of goods exports based on import-demand functions;

4. Estimated employment creation based on exports projections;
5. Export strategies and best practices in other countries including incentives and organizational structures for promoting exports that can be adapted in the Philippines;
6. Impact assessment of international and regional trade protocols to PH export competitiveness and market access.
7. Illustrative global value chains to assess MSMEs/exporters integration and valueadding contribution
8. Review current international and regional trading arrangements
9. Implications of the strategy for the structure of DTI and the Export Development Council
10. Establishing key industry sectoral targets/projections for policy/strategy formulation and adoption

**B. Updated framework of the PEDP 2022-2027**

1. Reviewed and updated of constraints to export development;
2. Policy and strategy recommendations to address impediments to export growth (e.g., policy review, industry development and promotion strategies);
3. Comparison of actual versus target exports.

**C. Export Strategies and Action Plans**

1. List of key export sectors and products (export champions, emerging and niche/specialty)
2. List of key markets matched with the key export sectors (markets with easy market access, high consumer demand and high import values)
3. Proposed strategy interventions for each identified key export sector (Policy, Industry development, innovation and, marketing and promotions)

**D. Monitoring and Evaluation System**

1. PEDP implementation Monitoring and Evaluation (M&E) system
2. Improved Trade in Value-added (TIVA) Statistics
3. Methodology in the conduct of regular exporters' expectations' survey

**E. Final draft of PEDP with complete data analytics as indicated in the scope of work and deliverables**

**The final deliverable of the assignment shall be the Philippine Export Development Plan (PEDP) delivered and accepted by the DTI and approved by the Export Development Council.**

**5. TIMING, LOGISTICS, AND OTHER ARRANGEMENTS**

The selected expert shall be engaged for a total of 180 days during the period of the Crafting of the PEDP 2022-2027 within a 6-month timeline.

**Crafting of the Plan (6 months)**

- Stakeholders Consultations (Within 2 months) with:

- Exporters/Business Support Organizations including Services Sector (National/Regional) –
- Academe (SUCs, Innovation Centers)
- Concerned DTI bureaus
- EDC Excom/Council Members
- Concerned Government Agencies listed under MC No. 27, s. 2017
- Expected Submission of Outputs
  - Review of PDP and PEDP Targets and their Bases, and new PEDP (within 2<sup>nd</sup> month)
  - Updated framework of the PEDP 2022-2027 (2<sup>nd</sup> month)
  - Export Strategies and Action Plans (3<sup>rd</sup> month)
  - Monitoring and Evaluation System (3<sup>rd</sup> month)
  - First Draft of the Plan (for comments and inputs of DTI) (4<sup>th</sup> month)
- Revision of the Plan (incorporating comments and inputs of DTI) (5<sup>th</sup> month)
- Presentation/Validation of the Revised Plan to DTI (6<sup>th</sup> month)
- Finalizing the Plan (6<sup>th</sup> month)
- Presentation of the Final Draft Plan to DTI and approval of the Council (6<sup>th</sup> month)

An **organizational meeting** shall be convened by the DTI on the first day of the engagement to discuss and ensure common understanding of the objective, tasks, expected outputs, and working arrangements set forth in this Terms of Reference.

On or before the last day of the engagement, the Consultant shall present the substantive findings and recommendations at a **debriefing meeting** to be convened and notified by DTI. All concerned parties shall have the opportunity to react to the findings and recommendations to be reflected in the expert's Report at that meeting.

## 6. **REPORTS AND REPORTING SCHEDULE**

The Consultant shall prepare an **Inception Report**, covering among others an update of the review activities; agreed workplan, major findings with a bearing on the assignment, and proposed outline of table of content of the draft Plan, submitted to DTI after the organizational meeting.

The consultant shall report progress and outputs to DTI for validation every 4<sup>th</sup> week of the month.

The Consultant shall prepare the Final Plan and Report in accordance with the requirements set by the contracting party.

The Consultant shall report to DTI through the Export Marketing Bureau. The medium of all reports to be submitted shall be bound hard copy and electronic copy.

## 7. **DELIVERABLES AND SCHEDULE OF PAYMENT**

Deliverables/Activities	Timeline	Means of Verification	Payment schedule
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Mobilization	Upon notarization of signed contract	Notarized signed contract	-
Submission of inception report	14 calendar working days after notarization of signed contract	Approved inception report	-
Submission of initial draft plan	120 calendar days after the notarization of contract	Accepted Initial draft plan (see item 4.a, 4.b, 4.c and 4.d)	40%
Submission of the 2nd/ accepted revised draft of plan  Presentation and validation of the revised plan to DTI and EDC Excom	14 calendar days after receipt of comments/inputs of DTI for the first draft of plan	Accepted Revised draft plan (see item 4.a, 4.b, 4.c and 4.d)	25%
Submission and presentation of final draft of the plan to the EDC	14 calendar days after receipt of comments/inputs of DTI and EDC-ExCom for the 2 <sup>nd</sup> or revised draft of plan	Accepted final draft plan (see item 4.a, 4.b, 4.c and 4.d)	25%
Final Plan and Approval of the Council	Within 14 calendar days after presentation and receipt of comments/inputs of EDC for the final draft of plan	Approved final plan (see item 4.E)	10%

## 8. **IMPLEMENTATION PROCESS**

The Consultant shall be responsible for carrying out specific tasks relevant to the various stages of the project and shall ensure the timely submissions of all required deliverables of this project. Sections 4-7 detail these specific tasks.

The implementation of this Project shall be subject to government accounting and auditing rules and regulations.

### a. **ELIGIBILITY REQUIREMENTS**

#### A. **Consulting Firm's Profile**

- Relevant experience of at least 3 years as a consulting firm and must have completed at least two (2) government-related projects.

#### B. **Expert/Consultant's Profile**

There must be a **team** composed of experts in complete *data analytics, government policies, export policies, economics, industry development, export marketing and development and branding management.*

- The **team leader** should possess a minimum of ten (10) years post-qualification work experience in trade policy and strategy formulation.
- The **team members** must have prior experience in the formulation of national development strategies, including export competitiveness and branding management.
- The **other members of the team** should demonstrate a minimum of 10 years relevant working experience in the complete data analysis of export markets, industry development and export marketing and development and branding management.

## b. **SELECTION CRITERIA**

### A. The criteria and rating system for short listing are:

1. Applicable experience of the consultant, considering both the overall experiences of the firm, or in case of new firms, the individual experiences of the principal and key staff, including the times when employed by other consultants (50 points);
2. Qualification of personnel who may be assigned to the job vis-à-vis extent and complexity of the undertaking (30 points); and
3. Current workload relative to capacity (20 points).
4. Cut-off score should be 70 points with a minimum of 3 shortlisted bidders.

### B. Qualified Bidders Selection Criteria

The following criteria will be used to assess responding bidders based on Quality-Cost Based Evaluation/Selection (QCBE/QCBS) procedure:

#### 1. **Technical Proposal (70%)**

##### a) **Qualifications of key personnel**

Each consultant/ bidder shall submit curriculum vitae who shall be assessed based on experience and academic qualifications.

Project Manager/Team Leader
Export Development and Marketing Expert
National Development Policy and Strategy Expert
Industry Development Expert
Data Analysis Expert
Brand Management Expert

**b) Track Record**

Number of on-going or completed government-related projects:

- Two projects
- More than two (2) projects

Each bidder shall identify relevant government-related projects:

Name of Similar Project	Client	Date of Contract	Amount of Contract	Completion Date

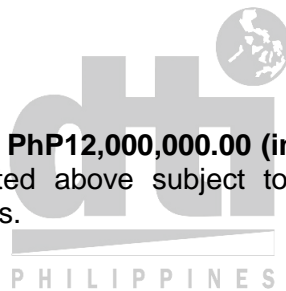
**c) Current workload relative to capacity**

Number of on-going projects

- 1 project
- 2 or more projects

**2. Financial Proposal (30%)****C. BUDGET**

The total working budget is **PhP12,000,000.00 (inclusive of VAT)** and should cover all requirements enumerated above subject to the government accounting and auditing rules and regulations.



## Annex B

### **Technical Proposal Forms**

#### **Notes for Consultants**

The following summarizes the content and maximum number of pages permitted for the Technical Proposal. A page is considered to be one printed side of A4 or letter sized paper.

##### **Cover Letter**

Use TPF 1. Technical Proposal Submission Form TPF 1. Technical Proposal Submission Form.

##### **Experience of the Firm**

Maximum of *[insert acceptable number of pages]* introducing the background and general experience of the Consultant, including its partner(s) and subconsultants, if any.

Maximum of *[insert acceptable number of pages]* completed projects in the format of TPF 2. Consultant's References illustrating the relevant experience of the Consultant, including its partner and subconsultants, if any. No promotional material should be included.

##### **General approach and methodology, work and staffing schedule**

Use TPF 4. Description of the Methodology and Work Plan for Performing the Project, TPF 5. Team Composition and Task, TPF 7. Time Schedule for Professional Personnel, and

##### **TPF 8. Activity (Work) Schedule.**

*If subcontracting is allowed, add the following:* If the Consultant will engage a subconsultant for the portions of the Consulting Services allowed to be subcontracted, the Consultant shall indicate which portions of the Consulting Services will be subcontracted, identify the corresponding subconsultant, and include the legal eligibility documents of such subconsultant.

##### **Curriculum Vitae (CV)**

Use TPF 6. Format of Curriculum Vitae (CV) for Proposed Professional Staff.

##### **Comments on the terms of reference and data and facilities to be provided by the Procuring Entity**

Not more than *[insert acceptable number of pages]* using TPF 3. Comments and Suggestions of Consultant on the Terms of Reference and on Data, Services, and Facilities to be Provided by the

## TPF 1. Technical Proposal Submission Form

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[Date]

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for [Title of Project] in accordance with your Bidding Documents dated [insert date] and our Bid. We are hereby submitting our Bid, which includes this Technical Proposal, and a Financial Proposal sealed under a separate envelope.

In accordance with **ITB** Clause 21.1, we confirm that the information contained in the eligibility documents submitted earlier together with the Expression of Interest remain correct as of the date of bid submission.

If negotiations are held during the period of bid validity, *i.e.*, before [insert date], we undertake to negotiate on the basis of the proposed staff. Our Bid is binding upon us and subject to the modifications resulting from contract negotiations.

In accordance with **GCC** Clause 51, we acknowledge and accept the Procuring Entity's right to inspect and audit all records relating to our Bid irrespective of whether we enter into a contract with the Procuring Entity as a result of this Bid or not.

We understand you are not bound to accept any Bid received for the selection of a consultant for the Project.

We acknowledge that failure to sign this Technical Proposal Submission Form and the abovementioned Financial Proposal Submission Form shall be a ground for the rejection of our Bid.

We remain,



Yours sincerely,

Authorized Signature:

Name and Title of Signatory:

Name of Firm:

Address:

## TPF 2. Consultant's References

### Relevant Services Carried Out in the Last Five Years That Best Illustrate Qualifications

Using the format below, provide information on each project for which your firm/entity, either individually, as a corporate entity, or as one of the major companies within an association, was legally contracted.

Project Name:		Country:
Location within Country:		Professional Staff Provided by Your Firm/Entity(profiles):
Name of Client:		Nº of Staff:
Address:		Nº of Staff-Months; Duration of Project:
Start Date (Month/Year):	Completion Date (Month/Year):	Approx. Value of Services (in Current US\$):
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 by Your Staff:		

Consultant's Name: \_\_\_\_\_

PHILIPPINES

**TPF 3. Comments and Suggestions of Consultant on the Terms of Reference and on Data, Services, and Facilities to be Provided by the Procuring Entity**

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On the Terms of Reference:

- 1.
- 2.
- 3.
- 4.
- 5.

On the data, services, and facilities to be provided by the Procuring Entity:

- 1.
- 2.
- 3.
- 4.
- 5.



## **TPF 4. Description of the Methodology and Work Plan for Performing the Project**

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**TPF 5. Team Composition and Task**

<b>1. Technical/Managerial Staff</b>		
Name	Position	Task

<b>2. Support Staff</b>		
Name	Position	Task

3 Where applicable, indicate relationships among the Consultant and any partner and/or subconsultant, the Procuring Entity, the Funding Source and other parties or stakeholders.

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### **TPF 6. Format of Curriculum Vitae (CV) for Proposed Professional Staff**

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Proposed Position: \_\_\_\_\_

Name of Firm: \_\_\_\_\_

Name of Staff: \_\_\_\_\_

Profession: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Years with Firm/Entity: \_\_\_\_\_ Nationality: \_\_\_\_\_

Membership in Professional Societies: \_\_\_\_\_

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Detailed Tasks Assigned: \_\_\_\_\_

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#### **Key Qualifications:**

*[Give an outline of staff member's experience and training most pertinent to tasks on project. Describe degree of responsibility held by staff member on relevant previous projects and give dates and locations. Use about half a page.]*

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#### **Education:**

*[Summarize college/university and other specialized education of staff members, giving names of schools, dates attended, and degrees obtained. Use about one quarter of a page.]*

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#### **Employment Record:**

*[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, and locations of projects. For experience in last ten years, also give types of activities performed and client references, where appropriate. Use about two pages.]*

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#### **Languages:**

*[For each language, indicate proficiency: excellent, good, fair, or poor in speaking, reading, and writing.]*

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**Certification:**

I, the undersigned, certify that to the best of my knowledge and belief, these data correctly describe me, my qualifications, and my experience.

**Commitment:**

I also commit to work for the Project in accordance with the time schedule as indicated in the contract once the firm is awarded the Project.

\_\_\_\_\_ Date: \_\_\_\_\_  
*[Signature of staff member and authorized representative of the firm]* Day/Month/Year

Full name of staff member: \_\_\_\_\_  
Full name of authorized representative: \_\_\_\_\_

**SUBSCRIBED AND SWORN** to before me this \_\_\_ day of *[month]* *[year]* at *[place of execution]*, Philippines. Affiant/s is/are personally known to me and was/were identified by me through competent evidence of identity as defined in the 2004 Rules on Notarial Practice (A.M. No. 02-8-13-SC). Affiant/s exhibited to me his/her *[insert type of government identification card used]*, with his/her photograph and signature appearing thereon, with no. \_\_\_\_\_.

Witness my hand and seal this \_\_\_ day of *[month]* *[year]*.

**NAME OF NOTARY PUBLIC**



**Serial No. of Commission** \_\_\_\_\_  
**Notary Public for** \_\_\_\_\_ **until** \_\_\_\_\_  
**Roll of Attorneys No.** \_\_\_\_\_  
**PTR No.** \_\_\_\_, *[date issued]*, *[place issued]*  
**IBP No.** \_\_\_\_, *[date issued]*, *[place issued]*  
**Doc. No.** \_\_\_\_  
**Page No.** \_\_\_\_  
**Book No.** \_\_\_\_  
**Series of** \_\_\_\_\_.

**TPF 7. Time Schedule for Professional Personnel**

Name	Position	Reports Due/Activities	Months (in the Form of a Bar Chart)												Number of Months			
			1	2	3	4	5	6	7	8	9	10	11	12				
																	Subtotal (1)	
																		Subtotal (2)
																		Subtotal (3)
																		Subtotal (4)

Full-time: \_\_\_\_\_  
 Reports Due: \_\_\_\_\_  
 Activities Duration: \_\_\_\_\_  
 Location: \_\_\_\_\_

Part-time: \_\_\_\_\_ PHILIPPINES

Signature: \_\_\_\_\_  
 (Authorized representative)

Full Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Address: \_\_\_\_\_

**TPF 8. Activity (Work) Schedule**

**A. Field Investigation and Study Items**

	<i>[1st, 2nd, etc. are months from the start of project.]</i>											
	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th
Activity (Work)												
_____												
_____												
_____												
_____												

**B. Completion and Submission of Reports**

Reports	Date
1. Inception Report	
2. Interim Progress Report (a) First Status Report (b) Second Status Report	
3. Draft Report	
4. Final Report	

## Annex C

### *Financial Proposal Forms*

#### **Notes for Consultants**

The following summarizes the content of the Financial Proposal.

##### **Cover Letter**

Use FPF 1. Financial Proposal Submission Form, which is an acknowledgement that, in preparation and submission of the Technical and Financial Proposals, Consultants have:

- (a) followed the applicable rules and guidelines indicated in this ITB;
- (b) not taken any action which is or constitutes a corrupt, fraudulent, or coercive practice as defined in the applicable rules and guidelines; and
- (c) agrees to allow the Procuring Entity and the Funding Source, at their option, to inspect and audit all accounts, documents, and records relating to the its Bid and to the performance of the ensuing contract.

##### **Costs of Consulting Services**

Use FPF 2. Summary of Costs; FPF 3. Breakdown of Price per Activity; FPF 4. Breakdown of Remuneration per Activity; FPF 5. Reimbursable per Activity; and FPF 6. Miscellaneous Expenses.

## FPF 1. Financial Proposal Submission Form

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[Date]

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for [Title of Project] in accordance with your Bidding Documents dated [insert date] and our Bid (Technical and Financial Proposals). Our attached Financial Proposal is for the sum of [amount in words and figures]. This amount is exclusive of the local taxes, which we have estimated at [amount(s) in words and figures].

Our Financial Proposal shall be binding upon us subject to the modifications resulting from Contract negotiations, up to expiration of the bid validity period, *i.e.*, [Date].

In accordance with **GCC Clause Error! Reference source not found.**, we acknowledge and accept the Procuring Entity's right to inspect and audit all records relating to our Bid irrespective of whether we enter into a contract with the Procuring Entity as a result of this Bid.

We confirm that we have read, understood and accept the contents of the Instructions to Bidders (ITB), the Bid Data Sheet (BDS), General Conditions of Contract (GCC), Special Conditions of Contract (SCC), Terms of Reference (TOR), the provisions relating to the eligibility of Consultant and the applicable guidelines for the procurement rules of the Funding Source, any and all Bid bulletins issued and other attachments and inclusions included in the Bidding Documents sent to us.

We understand you are not bound to accept any Bid you receive.

We remain,

Yours sincerely,  
Authorized Signature:  
Name and Title of Signatory:  
Name of Firm:  
Address:

**FPF 2. Summary of Costs**

Costs	Currency(ies) <sup>1</sup>	Amount in Philippine Peso
Subtotal		
Local Taxes		
Total Amount of Financial Proposal		_____



<sup>1</sup> In cases of contracts involving foreign consultants, indicate the exchange rate used.



**FPF 3. Breakdown of Price per Activity**

Activity No.: _____	Activity No.: _____	Description: _____
Price Component	Currency(ies) <sup>2</sup>	Amount in Philippine Peso
Remuneration		
Reimbursables		
Miscellaneous Expenses		
Subtotal		_____



<sup>2</sup> In cases of contracts involving foreign consultants, indicate the exchange rate used.

**FPF 4. Breakdown of Remuneration per Activity**

Activity No. _____		Name: _____		
Names	Position	Input <sup>3</sup>	Remuneration Currency(ies) Rate	Amount
Regular staff				
Local staff				
Consultants				
Grand Total				_____



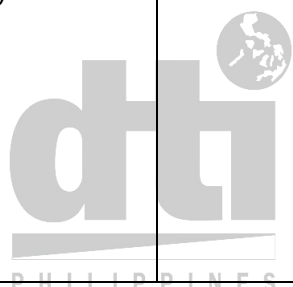
<sup>3</sup> Staff months, days, or hours as appropriate.

**FPF 5. Reimbursable per Activity**

Activity No: \_\_\_\_\_

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

No.	Description	Unit	Quantity	Unit Price In	Total Amount In
1.	International flights _____	Trip			
2.	Miscellaneous travel expenses	Trip			
3.	Subsistence allowance	Day			
4.	Local transportation costs <sup>4</sup>				
5.	Office rent/accommodation/ clerical assistance				
	Grand Total				_____



<sup>4</sup> Local transportation costs are not included if local transportation is being made available by the Entity. Similarly, in the project site, office rent/accommodations/clerical assistance costs are not to be included if being made available by the Entity.

**FPF 6. Miscellaneous Expenses**

Activity No. \_\_\_\_\_

Activity Name: \_\_\_\_\_

No.	Description	Unit	Quantity	Unit Price	Total Amount
1.	Communication costs between _____ and _____ (telephone, telegram, telex)				
2.	Drafting, reproduction of reports				
3.	Equipment: vehicles, computers, etc.				
3.	Software				
4.	Grand Total				_____



ANNEX D

**Omnibus Sworn Statement (Revised)**

*[shall be submitted with the Bid]*

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REPUBLIC OF THE PHILIPPINES )  
CITY/MUNICIPALITY OF \_\_\_\_\_ ) S.S.

**AFFIDAVIT**

I, [Name of Affiant], of legal age, [Civil Status], [Nationality], and residing at [Address of Affiant], after having been duly sworn in accordance with law, do hereby depose and state that:

1. *[Select one, delete the other:]*

*[If a sole proprietorship:]* I am the sole proprietor or authorized representative of [Name of Bidder] with office address at [address of Bidder];

*[If a partnership, corporation, cooperative, or joint venture:]* I am the duly authorized and designated representative of [Name of Bidder] with office address at [address of Bidder];

2. *[Select one, delete the other:]*

*[If a sole proprietorship:]* As the owner and sole proprietor, or authorized representative of [Name of Bidder], I have full power and authority to do, execute and perform any and all acts necessary to participate, submit the bid, and to sign and execute the ensuing contract for [Name of the Project] of the [Name of the Procuring Entity], as shown in the attached duly notarized Special Power of Attorney;

*[If a partnership, corporation, cooperative, or joint venture:]* I am granted full power and authority to do, execute and perform any and all acts necessary to participate, submit the bid, and to sign and execute the ensuing contract for [Name of the Project] of the [Name of the Procuring Entity], as shown in the attached [state title of attached document showing proof of authorization (e.g., duly notarized Secretary's Certificate, Board/Partnership Resolution, or Special Power of Attorney, whichever is applicable)];

3. [Name of Bidder] is not "blacklisted" or barred from bidding by the Government of the Philippines or any of its agencies, offices, corporations, or Local Government Units, foreign government/foreign or international financing institution whose blacklisting rules have been recognized by the Government Procurement Policy Board, **by itself or by relation, membership, association, affiliation, or controlling interest with another blacklisted person or entity as defined and provided for in the Uniform Guidelines on Blacklisting;**

4. Each of the documents submitted in satisfaction of the bidding requirements is an authentic copy of the original, complete, and all statements and information provided therein are true and correct;

5. [Name of Bidder] is authorizing the Head of the Procuring Entity or its duly authorized representative(s) to verify all the documents submitted;

6. *[Select one, delete the rest:]*

*[If a sole proprietorship:]* The owner or sole proprietor is not related to the Head of the Procuring Entity, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

*[If a partnership or cooperative:]* None of the officers and members of *[Name of Bidder]* is related to the Head of the Procuring Entity, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

*[If a corporation or joint venture:]* None of the officers, directors, and controlling stockholders of *[Name of Bidder]* is related to the Head of the Procuring Entity, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

7. *[Name of Bidder]* complies with existing labor laws and standards; and
8. *[Name of Bidder]* is aware of and has undertaken the responsibilities as a Bidder in compliance with the Philippine Bidding Documents, which includes:
  - a. Carefully examining all of the Bidding Documents;
  - b. Acknowledging all conditions, local or otherwise, affecting the implementation of the Contract;
  - c. Making an estimate of the facilities available and needed for the contract to be bid, if any; and
  - d. Inquiring or securing Supplemental/Bid Bulletin(s) issued for the *[Name of the Project]*.
9. *[Name of Bidder]* did not give or pay directly or indirectly, any commission, amount, fee, or any form of consideration, pecuniary or otherwise, to any person or official, personnel or representative of the government in relation to any procurement project or activity.
10. **In case advance payment was made or given, failure to perform or deliver any of the obligations and undertakings in the contract shall be sufficient grounds to constitute criminal liability for Swindling (Estafa) or the commission of fraud with unfaithfulness or abuse of confidence through misappropriating or converting any payment received by a person or entity under an obligation involving the duty to deliver certain goods or services, to the prejudice of the public and the government of the Philippines pursuant to Article 315 of Act No. 3815 s. 1930, as amended, or the Revised Penal Code.**

IN WITNESS WHEREOF, I have hereunto set my hand this \_\_\_ day of \_\_\_, 20\_\_ at \_\_\_\_\_, Philippines.

*[Insert NAME OF BIDDER OR ITS AUTHORIZED REPRESENTATIVE]*

*[Insert signatory's legal capacity]*

Affiant

**[Jurat]**

*[Format shall be based on the latest Rules on Notarial Practice]*

## Performance Securing Declaration (Revised)

*[if used as an alternative performance security but it is not required to be submitted with the Bid, as it shall be submitted within ten (10) days after receiving the Notice of Award]*

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REPUBLIC OF THE PHILIPPINES)  
CITY OF \_\_\_\_\_ ) S.S.

### PERFORMANCE SECURING DECLARATION

Invitation to Bid: [Insert Reference Number indicated in the Bidding Documents]

To: [Insert name and address of the Procuring Entity]

I/We, the undersigned, declare that:

1. I/We understand that, according to your conditions, to guarantee the faithful performance by the supplier/distributor/manufacture/contractor/consultant of its obligations under the Contract, I/we shall submit a Performance Securing Declaration within a maximum period of ten (10) calendar days from the receipt of the Notice of Award prior to the signing of the Contract.
2. I/We accept that: I/we will be automatically disqualified from bidding for any procurement contract with any procuring entity for a period of one (1) year for the first offense, or two (2) years **for the second offense**, upon receipt of your Blacklisting Order if I/We have violated my/our obligations under the Contract;
3. I/We understand that this Performance Securing Declaration shall cease to be valid upon:
  - a. issuance by the Procuring Entity of the Certificate of Final Acceptance, subject to the following conditions:
    - i. Procuring Entity has no claims filed against the contract awardee;
    - ii. It has no claims for labor and materials filed against the contractor; and
    - iii. Other terms of the contract; or
  - b. replacement by the winning bidder of the submitted PSD with a performance security in any of the prescribed forms under Section 39.2 of the 2016 revised IRR of RA No. 9184 as required by the end-user.

**IN WITNESS WHEREOF**, I/We have hereunto set my/our hand/s this \_\_\_\_ day of [month] [year] at [place of execution].

*[Insert NAME OF BIDDER OR ITS  
AUTHORIZED REPRESENTATIVE]  
[Insert signatory's legal capacity]  
Affiant*

**[Jurat]**

*[Format shall be based on the latest Rules on Notarial Practice]*

