



PHILIPPINE BIDDING DOCUMENTS

Procurement of Market Research and Consulting Services to Formulate the Ten-Year Education Tourism Roadmap

Part I

Reference No.: DOT-BAC-REI NO. 2024-008

CHECKLIST OF ELIGIBILITY REQUIREMENTS

THE ELIGIBILITY ENVELOPE SHALL CONTAIN THE FOLLOWING:

1. **ELIGIBILITY DOCUMENTS SUBMISSION FORM (ANNEX A);**
2. **Valid PhilGEPS Platinum Certificate of Registration and Membership (all pages) in accordance with Section 8.5.2 of the IRR.**

TECHNICAL DOCUMENTS

3. Statement of the perspective bidder of all its ongoing (*ANNEX TD-1*) and completed (*ANNEX TD-2*) 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 last five (5) years**. In case of completed contract, **please attach Certificate of Satisfactory Completion issued by the client.**
4. 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 (*ANNEX TD-3*), **including their respective curriculum vitae;**

CLASS ‘B’ Documents:

5. Valid Joint Venture Agreement (JVA) (*ANNEX JVA*), in case a joint venture is already in existence. In the absence of a JVA, duly notarized statements from all the potential joint venture partners stating that they will enter into and abide by the provisions of the JVA in the instance that he bid is successful, shall be included in the bid. Failure to enter into a joint venture in the event of a contract award shall be ground for the forfeiture of the bid security. **Each partner of the joint venture shall submit the PhilGEPS Certificate of Registration in accordance with the Section 8.5.2 of RA9184 and its IRR. The submission of technical and financial documents by any of the joint venture partners constitutes compliance.**

Note: *All documents shall be current and updated and any missing document in the above-mentioned Checklist is a ground for outright rejection of the bid. Bidders are required to submit one (1) original and three (3) photo copies of their eligibility documents.*

To facilitate the evaluation of the bids, bidders are advised to follow the arrangement in the above-mentioned checklist when placed in an Envelope, with documents tabbed and labeled accordingly.

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Section I. Request for Expression of Interest



Request for Expression of Interest for the Procurement of Market Research and Consulting Services to Formulate the Ten-Year Education Tourism Roadmap DOT-BAC-REI No. 2024-008

1. The *Department of Tourism (DOT)*, through the *FY 2024 General Appropriations Act (GAA)* intends to apply the sum of *Two Million Four Hundred Fifty Thousand Pesos (P2,450,000.00)* being the Approved Budget for the Contract (ABC) to payments under the contract for *DOT-BAC-REI No. 2024-008*. Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
2. The *DOT* now calls for the submission of eligibility documents for *Procurement of Market Research and Consulting Services to Formulate the Ten-Year Education Tourism Roadmap*. Eligibility documents of interested consultants must be duly received by the BAC Secretariat on or before *May 14, 2024 until 9:00 a.m. only at the Procurement Management Division, 4th Floor, DOT Bldg., No. 351 Sen. Gil Puyat Avenue, Makati City*. *Eligibility Check will be on May 14, 2024 to be held at the 4th Floor Conference Room, DOT Bldg., 351 Sen. Gil Puyat Avenue, Makati City at 10:00 a.m.* Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion.
3. Interested bidders may obtain further information from *DOT* and inspect the Bidding Documents at the address given below during *8:00 a.m. to 5:00 p.m.*
4. A complete set of Bidding Documents may be acquired by interested bidders on *May 7 to 13, 2024 (8:00 a.m. to 5:00 p.m.) from the address below*.

It may also be downloaded free of charge from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the website of the Procuring Entity.

5. The BAC shall draw up the short list of consultants from those who have submitted Expression of Interest, including the eligibility documents, and have been determined as eligible in accordance with the provisions of Republic Act 9184 (RA 9184), otherwise known as the “Government Procurement Reform Act”, and its Implementing Rules and Regulations (IRR). The short list shall consist of *five (5)* prospective bidders who will be entitled to submit bids. The criteria and rating system for short listing are:
 - *Applicable experience of the consultant and members in case of joint ventures, considering both the overall experiences of the firms or, in the case of new firms, the individual experiences of the principal and key staff, including the times when employed by other consultants (60%);*
 - *Qualification of personnel who may be assigned to the job vis-à-vis extent and complexity of the undertaking (30%); and*

- *Current workload relative to capacity (10%);*

Passing Rate: 70%

6. Bidding will be conducted through open competitive bidding procedures using non-discretionary “pass/fail” criterion as specified in the IRR of RA 9184.

Bidding is restricted to Filipino citizens/sole proprietorships, cooperatives, and partnerships or organizations with at least sixty percent (60%) interest or outstanding capital stock belonging to citizens of the Philippines.

7. The Procuring Entity shall evaluate bids using the *Quality Based Evaluation (QBE)* procedure. The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders.
8. The contract duration is for six (6) months from the receipt of the Notice to Proceed;
9. The *DOT* reserves the right to reject any and all bids, declare a failure of bidding, or not award the contract at any time prior to contract award in accordance with Section 41 of RA 9184 and its IRR, without thereby incurring any liability to the affected bidder or bidders.
10. For further information, please refer to:

Mr. GODOFREDO R. MALDONADO, JR.
Head, DOT-BAC Secretariat
Procurement Management Division, 4th Floor, DOT Bldg.
351 Sen. Gil Puyat Ave., Makati City
Telephone Nos. 459-5200 to 30 loc. 425
Email Address: grmaldonado@tourism.gov.ph
Facsimile No.: 459 5200 to 30 Loc. 425
Website Address: www.tourism.gov.ph

(Original Signed)
USEC. FERDINAND C. JUMAPAO
BAC Chairperson

Section II. Eligibility Documents

1. Eligibility Criteria

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

2. Eligibility Requirements

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

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

Technical Documents

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

- (b) **Class "B" Document –**

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

- 2.2. **The eligibility requirements or statements, the bids, and all other documents to be submitted to the BAC must be in English. If the eligibility requirements or statements, the bids, and all other documents**

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

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

3. Format and Signing of Eligibility Documents

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

4. Sealing and Marking of Eligibility Documents

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

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

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

5. Deadline for Submission of Eligibility Documents

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

6. Late Submission of Eligibility Documents

Any eligibility documents submitted after the deadline for submission and receipt prescribed in Clause 5 shall be declared "Late" and shall not be accepted by the Procuring Entity. The BAC shall record in the minutes of submission and opening of eligibility documents, the Bidder's name, its representative and the time the eligibility documents were submitted late.

7. Modification and Withdrawal of Eligibility Documents

7.1. The prospective bidder may modify its eligibility documents after it has been submitted; provided that the modification is received by the Procuring Entity prior to the deadline specified in Clause 5. The prospective bidder shall not be allowed to retrieve its original eligibility documents, but shall be allowed to submit another set equally sealed, properly identified, linked to its original bid marked as "ELIGIBILITY MODIFICATION" and stamped "received" by the BAC. Modifications received after the applicable deadline shall not be considered and shall be returned to the prospective bidder unopened.

7.2. A prospective bidder may, through a letter of withdrawal, withdraw its eligibility documents after it has been submitted, for valid and justifiable reason; provided that the letter of withdrawal is received by the

Procuring Entity prior to the deadline prescribed for submission and receipt of eligibility documents.

- 7.3. Eligibility documents requested to be withdrawn in accordance with this Clause shall be returned unopened to the prospective bidder concerned. A prospective bidder that withdraws its eligibility documents shall not be permitted to submit another set, directly or indirectly, for the same project. A prospective bidder that acquired the eligibility documents may also express its intention not to participate in the bidding through a letter which should reach and be stamped by the BAC before the deadline for submission and receipt of eligibility documents.

8. Opening and Preliminary Examination of Eligibility Documents

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

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

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

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

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

- 8.4. The eligibility of each prospective bidder shall be determined by examining each bidder's eligibility requirements or statements against a checklist of requirements, using non-discretionary "pass/fail" criterion, as stated in the Request for Expression of Interest, and shall be determined as either "eligible" or "ineligible." If a prospective bidder submits the specific eligibility document required, he shall be rated "passed" for that particular requirement. In this regard, failure to submit a requirement, or an incomplete or patently insufficient submission, shall be considered

“failed” for the particular eligibility requirement concerned. If a prospective bidder is rated “passed” for all the eligibility requirements, he shall be considered eligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as “eligible.” If a prospective bidder is rated “failed” in any of the eligibility requirements, he shall be considered ineligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as “ineligible.” In either case, the BAC chairperson or his duly designated authority shall countersign the markings.

9. Short Listing of Consultants

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

10. Protest Mechanism

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

Section III. Eligibility Data Sheet

Eligibility Data Sheet

Eligibility Documents	
1.2	Procurement of Market Research and Consulting Services to Formulate the Ten-Year Education Tourism Roadmap
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 within <i>five (5) years</i> prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	Certificate of Satisfactory Service or any other proof of completion of contract
4.2	Each prospective bidder shall submit <i>one (1) original and three (3) photo copies</i> of its eligibility documents.
4.3(e)	<i>USEC. FERDINAND C. JUMAPAO, DOT-BAC Chairperson c/o Mr. Godofredo R. Maldonado, Jr., DOT-BAC Head, Secretariat Procurement Management Division, 4th Floor, DOT Bldg., No. 351 Sen. Gil Puyat Ave., Makati City</i>
4.3(f)	<i>Ref. No.: DOT-BAC-REI No. 2024-008</i>
5	The address for submission of eligibility documents is at the <i>Procurement Management Division, 4th Floor, DOT Bldg., No. 351 Sen. Gil Puyat Ave., Makati City</i> The deadline for submission of eligibility documents is <i>on or before 9:00 A.M. only of May 14, 2024</i>
8.1	The place of opening of eligibility documents is at the <i>4th Floor Conference Room, DOT Bldg., No. 351 Sen. Gil Puyat Ave., Makati City</i> The Opening of Eligibility Documents will be on <u>March 14, 2024 at 10:00 am.</u>
9.1	Similar contracts shall refer to the same nature as the project to be bid.
9.2	(a) Applicable experience of the consultant and members in case of joint ventures, considering both the overall experiences of the firms or, in the case of new firms, the individual experiences of the principal and key staff, including the times when employed by other consultants (60%); (b) Qualification of personnel who may be assigned to the job vis-à-vis extent and complexity of the undertaking (30%); and

(c) Current workload relative to capacity (10%);

Passing Score: 70%

Please find below the **Eligibility Check and Shortlisting Criteria and Rating:**

I.	Applicable Experience of the Consultant	60
A.	Relevance of the Company Portfolio to the Project (25)	
1.	Bidder has conducted at least three (3) research projects	20
2.	Bidder has conducted at least one to two (1-2) research projects	10
3.	Additional – Bidder has conducted at least two (2) tourism-related research project	5
B.	Years of Experience (20)	
1.	Bidder has more than five (5) years of experience conducting research or consulting projects.	20
2.	Bidder has five (5) years of experience conducting research or consulting projects.	10
C.	Past Clients (15)	
1.	Bidder has completed two (2) or more education tourism and/or any related research/planning projects for the past five (5) years with a contract cost equal to or greater than the ABC	15
2.	Bidder has completed one (1) education tourism and/or any related research/planning project for the past five (5) years with a contract cost equal to or greater than the ABC	10
II.	Quality of Personnel Assigned (30)	30
	All of the assigned personnel must have experience in at least two (2) research/technical assistance projects	20
	One (1) of the assigned personnel has research management or related experience in at least one (1) research/technical assistance project	10 pts.
	Additional with tourism related projects	10

	III.	Current Workload Relative to Capacity (10)	10
		Bidder has one to three (1-3) ongoing projects with contract costs equal to or greater than the Approved Budget for the Contract (ABC).	10
		Bidder has no ongoing projects with contract costs equal to or greater than the ABC.	5
		Total	100
		<i>Passing score</i>	<i>70</i>

