



**Social Security System**  
East Avenue, Diliman, Quezon City

# **PHILIPPINE BIDDING DOCUMENTS**

**Fifth Edition**  
**October 2016**

## **PART I**

# **Procurement of CONSULTING SERVICES**

**HIRING OF CONSULTANT TO CONDUCT THE  
HIGHEST AND BEST USE (HABU) STUDY WITH  
VALUATION OF DEVELOPMENT AND  
USUFRUCTUARY RIGHTS (DUR) AND CRAFTING OF  
THE TERMS OF REFERENCE (TOR) FOR THE  
DEVELOPMENT OF SSS PRIME INVESTMENT  
PROPERTIES (IPs)  
(3<sup>RD</sup> ADVERTISEMENT)**

**REI-SSS-CONSULTING-2024-005**

**Government of the Republic of the Philippines**  
**JUNE 2024**

  
**ATTY. MARIANO PABLO S. TOLENTINO**  
TWG Chairperson

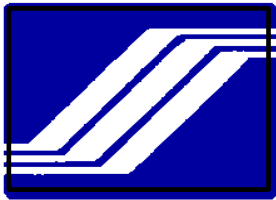
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# ***Section I. Request for Expression of Interest***





REPUBLIC OF THE PHILIPPINES  
**SOCIAL SECURITY SYSTEM**

East Avenue, Diliman, Quezon City  
Tel. Nos. (632)8709-7198\*(632)8920-6446

E-mail: [usssaptayo@sss.gov.ph](mailto:usssaptayo@sss.gov.ph)\*Website <http://www.sss.gov.ph>

***Request for Expression of Interest***  
***REI-SSS-Consulting-2024-005***

**HIRING OF CONSULTANT TO CONDUCT THE HIGHEST AND BEST USE (HABU) STUDY WITH VALUATION OF DEVELOPMENT AND USUFRUCTUARY RIGHTS (DUR) AND CRAFTING OF THE TERMS OF REFERENCE (TOR) FOR THE DEVELOPMENT OF SSS PRIME INVESTMENT PROPERTIES (IPs) (3<sup>RD</sup> ADVERTISEMENT)**

1. The **Social Security System (SSS)**, through the Approved 2024 Corporate Operating Budget under MOOE with Code PAP 2024-0226 & 2024-0227 of the Annual Procurement Plan (APP), intends to apply the sum of **₱7,421,200.00**, being the Approved Budget for the Contract (ABC) to payments under the contract for **Hiring of Consultant to Conduct the Highest and Best Use (HABU) Study with Valuation of Development and Usufructuary Rights (DUR) and Crafting of the Terms of Reference (TOR) for the Development of SSS Prime Investment Properties (IPs) (3<sup>RD</sup> Advertisement)**.

A bidder shall be allowed to submit its bid for either or both of the two (2) Lots. Bids received in excess of the ABC of the lot subject of the bid as indicated below shall be automatically rejected at the opening of the financial proposals:

Lot	Property	ABC
1	Bonifacio Global City (BGC) Property, Taguig City	₱3,636,000.00
2	Financial Center Area (FCA) 7-ha. Property, Pasay City	3,785,200.00
	<b>TOTAL</b>	<b>₱7,421,200.00</b>

2. The **Social Security System** now calls for the submission of eligibility documents for the **conduct of the HABU study with Valuation of DUR and crafting of the TOR for the development of the SSS prime IPs**.

Eligibility documents of interested consultants must be duly received by the **BAC Secretariat on or before 09 July 2024 (Tuesday) not later than 2:00pm**. at the Bidding Room, 2<sup>nd</sup> Floor, SSS Main Building, East Avenue, Diliman, Quezon City. Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion. Late submission of eligibility documents shall not be accepted.

Interested consultants must have **at least five (5) years of experience in consultancy and advisory services or other technical services or special studies, specifically, in real property development and all aspects of property marketing, management, development, investment and occupation**. Consultants must have completed at least one (1) HABU study, one (1) DUR valuation and one (1) TOR on real property development located in any Central Business Districts (CBDs) nationwide within the past ten (10) years prior to the submission of the eligibility documents.

For purposes of this project, **HABU** is *defined as the reasonably probable and legal use of vacant land or an improved property, which is physically possible, appropriately supported, and financially feasible and that results in the highest value. Market value of the DUR is defined as the right to use and possess the land for re-development under a joint venture (JV) arrangement, either through a contractual agreement or a JV company (JVC) into a mixed-use commercial, excluding the naked ownership rights of the subject property.*

*The DUR is intended to be the baseline value of the contribution of the SSS to the JV, either a JVC or contractual agreement, for the development/re-development of the subject property/ies. The **TOR** is a document that outlines, among others, the objectives/purposes, parameters and expectations of a task or project, including the scope of work, activities, and respective responsibilities of the parties.*

*CBD is the commercial and business center of a city. It is the part of the city which contains the principal commercial streets and main public buildings. A CBD may be characterized by a number of land use changes that include industrial, residential, commercial, administration, and consumption.*

The scope of the HABU study with valuation of DUR and crafting of TOR for the development of the SSS prime investment properties is described in Part II of the Bidding Documents under Section VI. Terms of Reference.

**Only one company representative is allowed to attend the manual opening of Eligibility Documents. Other company representative may witness the opening of Eligibility Documents through Microsoft Teams. Kindly e-mail us on or before 08 July 2024, through e-mail address bac@sss.gov.ph, the following:**

- a. **Name of the representative and e-mail address; and**
  - b. **Technical and administrative queries.**
3. Interested bidders may obtain further information from the SSS and inspect the Bidding Documents at the address stated in item number 12 of the REI from Monday to Friday, 8:00 a.m. to 5:00 p.m.
4. A complete set of Bidding Documents may be acquired by interested bidders starting **01 July 2024 up to the scheduled submission & opening of eligibility documents** from the address stated in item number 12 of the REI.

Payment for the Bidding Documents shall be paid by the Shortlisted Bidders only, as follows:

<i>Lot</i>	<i>Price of Bid Documents (non-refundable)</i>
1	₱4,000.00
2	₱4,000.00

The mode of payment will be on a cash basis payable at the SSS Cash Department, Ground Floor, SSS Main Building, upon accomplishment of SSS Form R-6. The Bidding Documents shall be received personally by the prospective Bidder or his authorized representative.

It may also be **downloaded free of charge** from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the website of the SSS, provided that Shortlisted Bidders shall pay the applicable fee for the Bidding Documents not later than the submission of their bids.



5. The BAC shall draw up the short list of consultants from those who have submitted Expression of Interest, including the eligibility documents and have been determined as eligible in accordance with the provisions of Republic Act 9184 (RA 9184), otherwise known as the “Government Procurement Reform Act”, and its Implementing Rules and Regulations (IRR).

The short list shall consist of maximum of five (5) prospective bidders per Lot who will be entitled to submit bids.

The criteria shall be provided in the Terms of Reference (TOR) and rating system for short listing are the following:

CRITERIA	REQUIREMENT	MAX. PTS								
A. Length of Existence of Consulting firm	<p>Must be duly registered and authorized by the appropriate agencies with at least five (5) years of existence as a Real Estate Consultancy firm licensed to do business in the Philippines prior to the submission of eligibility documents.</p> <p>≥10 years (10 years and above) : 20 points ≥ 5 years to ≤ 9 years (5 to 9 years): 15 points &lt; 5 years (below 5 years): disqualified</p> <p>Bidder must provide a brief background or profile of the company to determine the length of existence of the consulting firm.</p>	20								
B. Applicable Experience of the Consulting Firm	<table><tr><th>Particular</th><th>Points</th></tr><tr><td>b.1 <b>Minimum Work Experience Requirements:</b> Consulting firm must have completed One (1) HABU study, one (1) DUR Valuation and one (1) TOR within the last ten (10) years prior to the submission of eligibility documents, to be <b>ELIGIBLE</b> and earn 20 points otherwise shall be <b>disqualified</b>.</td><td>20</td></tr><tr><td>b.2 To earn additional points, Bidder must have additional work experiences (excluding the minimum experience considered in item b.1) on any of the following: One (1) HABU = 1 point One (1) DUR = 1 point One (1) TOR = 1 point  The Bidder who submitted the highest number of Additional Work Experience (AWE) shall be given the maximum <b>Score (S)</b> of 20 points.  The S of other Bidder/s shall be computed based on the formula indicated below:  <math display="block">S = \frac{\text{Actual AWE}}{\text{Highest AWE}} \times 20 \text{ points}</math> Where: S is the score of the Bidder AWE – is the number of Additional Work Experience listed by the Bidder in the last ten (10) years prior to the submission of eligibility documents.</td><td>20</td></tr><tr><td><b>Total</b></td><td><b>40</b></td></tr></table>	Particular	Points	b.1 <b>Minimum Work Experience Requirements:</b> Consulting firm must have completed One (1) HABU study, one (1) DUR Valuation and one (1) TOR within the last ten (10) years prior to the submission of eligibility documents, to be <b>ELIGIBLE</b> and earn 20 points otherwise shall be <b>disqualified</b> .	20	b.2 To earn additional points, Bidder must have additional work experiences (excluding the minimum experience considered in item b.1) on any of the following: One (1) HABU = 1 point One (1) DUR = 1 point One (1) TOR = 1 point  The Bidder who submitted the highest number of Additional Work Experience (AWE) shall be given the maximum <b>Score (S)</b> of 20 points.  The S of other Bidder/s shall be computed based on the formula indicated below:  $S = \frac{\text{Actual AWE}}{\text{Highest AWE}} \times 20 \text{ points}$ Where: S is the score of the Bidder AWE – is the number of Additional Work Experience listed by the Bidder in the last ten (10) years prior to the submission of eligibility documents.	20	<b>Total</b>	<b>40</b>	40
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<b>Total</b>	<b>40</b>									



	The Bidder must provide a list of all ongoing and completed government and private contracts (forms supplied), and must submit the required certificate of satisfactory completion/ acceptance or certificate of full payment issued by the listed client (s) of the prospective bidder for the listed project(s).																																																																																									
C. Qualification of Key Personnel of the Consultant	<p>The Bidder shall submit a list of at least four (4) key personnel to be assigned to the project (form supplied), composed of Senior Officer (SO), Financial Analysts (FA), Technical Analyst (TA) and Researcher (R ) including their respective curriculum vitae indicating their work experience, educational attainment, training/seminar attended and their respective position in the performance of the project. Failure to submit the required documents shall be a ground for disqualification.</p> <p>The assigned key personnel must have relevant work experience for the last ten (10) years, relevant educational attainment and related seminars and/or trainings attended for the last five (5) years prior to the submission of eligibility documents, as prescribed in Sec. III - Eligibility Data Sheet.</p> <p>Only one (1) assigned personnel per position shall be rated for evaluation purposes. The Winning Bidder may assign additional personnel to complete the study without additional cost to SSS.</p> <table><tr><th rowspan="2">Qualification</th><th colspan="4">Equivalent Points</th><th rowspan="2">Max. Pts.</th></tr><tr><th>SO</th><th>FA</th><th>TA</th><th>R</th></tr><tr><td>Experience: Max. Pts</td><td>9</td><td>5</td><td>5</td><td>2</td><td></td></tr><tr><td>≥10 years (10 years and above)</td><td>9</td><td>5</td><td>5</td><td>2</td><td></td></tr><tr><td>≥5 years ≤ 9 years (5 to 9 years)</td><td>6</td><td>3</td><td>3</td><td>1</td><td></td></tr><tr><td>&lt;5 years (Below 5 years)</td><td>3</td><td>1</td><td>1</td><td>0.50</td><td></td></tr><tr><td>Educational Attainment Max. Pts.</td><td>2</td><td>1</td><td>1</td><td>1</td><td></td></tr><tr><td>Graduate Studies</td><td>2</td><td>1</td><td>1</td><td>1</td><td></td></tr><tr><td>College Grad:</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>-With PRC License</td><td>1.2</td><td>0.70</td><td>0.70</td><td>0.70</td><td></td></tr><tr><td>-Without PRC license</td><td>1</td><td>0.50</td><td>0.50</td><td>0.50</td><td></td></tr><tr><td>No. of Training/ Seminar Max. Pts.</td><td>1</td><td>1</td><td>1</td><td>1</td><td></td></tr><tr><td>≥5 (5 and above )</td><td>1</td><td>1</td><td>1</td><td>1</td><td></td></tr><tr><td>&lt;5 (below 5)</td><td>0.50</td><td>0.50</td><td>0.50</td><td>0.50</td><td></td></tr><tr><td>Maximum Points per Key Personnel</td><td>12</td><td>7</td><td>7</td><td>4</td><td>30</td></tr></table>	Qualification	Equivalent Points				Max. Pts.	SO	FA	TA	R	Experience: Max. Pts	9	5	5	2		≥10 years (10 years and above)	9	5	5	2		≥5 years ≤ 9 years (5 to 9 years)	6	3	3	1		<5 years (Below 5 years)	3	1	1	0.50		Educational Attainment Max. Pts.	2	1	1	1		Graduate Studies	2	1	1	1		College Grad:						-With PRC License	1.2	0.70	0.70	0.70		-Without PRC license	1	0.50	0.50	0.50		No. of Training/ Seminar Max. Pts.	1	1	1	1		≥5 (5 and above )	1	1	1	1		<5 (below 5)	0.50	0.50	0.50	0.50		Maximum Points per Key Personnel	12	7	7	4	30	30
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Maximum Points per Key Personnel	12	7	7	4	30																																																																																					
D. Current Workload Relative to Capacity	<p>The Consultant shall also submit the complete list of all its technical personnel/professionals either as a regular employee or on a per-project basis, including their respective Curriculum Vitae (form supplied),</p> <p>The bidders shall be ranked based on the computed score using the formula indicated below :</p> <p style="text-align: center;">Score = A/B</p>	10																																																																																								

	<p>Where: A is the number of submitted on-going/current projects B is the number of submitted personnel/employees</p> <p>The Bidders shall be given equivalent points based on the result of their computed Score as follows:</p> <table><tr><th>Particular</th><th>Points</th></tr><tr><td>With highest capacity among other bidders based on lowest computed score</td><td>10</td></tr><tr><td>With neither the highest nor lowest capacity among bidders based on computed score</td><td>7</td></tr><tr><td>With lowest capacity among other bidders based on highest computed score</td><td>5</td></tr></table>	Particular	Points	With highest capacity among other bidders based on lowest computed score	10	With neither the highest nor lowest capacity among bidders based on computed score	7	With lowest capacity among other bidders based on highest computed score	5	
Particular	Points									
With highest capacity among other bidders based on lowest computed score	10									
With neither the highest nor lowest capacity among bidders based on computed score	7									
With lowest capacity among other bidders based on highest computed score	5									
TOTAL		100								
PASSING SCORE		70 pts								

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 SSS shall evaluate bids using the *Quality-Cost Based Evaluation (QCBE)* procedure. The weights to be allocated for the Technical and Financial Proposals are indicated in Clause 25.1, Section III, Bid Data Sheet, Part II of the Bidding Documents. The criteria and rating system for the evaluation of bids as indicated in the Instructions to Bidders are provided in Clause 25.1 and 26.2, Section III, Bid Data Sheet, Part II of the Bidding Documents.
8. The Deliverables in each of the contracts shall be completed within a **maximum period of two hundred sixty-four (264) calendar days** broken down below, reckoning from the date of signing of Consultancy Services Agreement (CSA) and issuance of Notice to Proceed (NTP) and excludes the period of review/evaluation and approval in between stages of work:

No.	DELIVERABLES	DELIVERY PERIOD
1	Submission of initial HABU study with valuation of DUR for the development/investment options for each property, for review and acceptance by the Senior Vice President (SVP) for Lending and Asset Management Group (LAMG) and Executive Vice President (EVP) for Investments Sector (IS)  - One (1) set for each property	Within sixty (60) calendar days upon receipt of NTP
	Revised HABU study with valuation of DUR incorporating the comments, if any, of the SVP-LAMG and/or EVP-IS	Within twenty (20) calendar days from receipt of the Notice to Revise (NTR) in any of the two (2) IPs  For succeeding revisions, if any, the Consultant shall be given ten (10) calendar days per revision, up to two



		(2) revisions, within which to submit its revised HABU study with valuation of DUR from receipt of NTR.
2	Presentation of the Final HABU study with valuation of DUR to the Risk Management and Investment Committee (RMIC) for its approval of endorsement to the SSC.	One (1) day, on the RMIC's scheduled meeting
	Revised HABU study with valuation of DUR incorporating the comments of the RMIC, if any, as certified by the SVP for LAMG.	<p>Within fifteen (15) calendar days from receipt of the NTR in any of the two (2) IPs and as certified by the Head, LAMG</p> <p>For succeeding revisions, if any, the Consultant shall be given ten (10) calendar days per revision, up to two (2) revisions, within which to submit its revised HABU study with valuation of DUR from receipt of NTR.</p>
3	<p>Presentation of the Final HABU study with valuation of DUR to the SSC for its approval.</p> <ul style="list-style-type: none"> <li>- Three (3) sets hard copy of the final HABU study with valuation of DUR for each property</li> <li>- Soft copy (USB storage device) of the written report</li> </ul>	One (1) day, on the SSC's scheduled meeting
	Revised HABU study with valuation of DUR incorporating the comments of the SSC, if any, as certified by the SVP for LAMG.	<p>Within fifteen (15) calendar days from receipt of the NTR in any of the two (2) IPs and as certified by the SVP for LAMG.</p> <p>For succeeding revisions, if any, the Consultant shall be given ten (10) calendar days per revision, up to two (2) revisions, within which to submit its revised HABU study with valuation of DUR from receipt of NTR.</p>
4	<p>Submission of initial TOR for the recommended development/investment option for each property, for review and acceptance by the SVP-LAMG and EVP-IS</p> <ul style="list-style-type: none"> <li>- One (1) set for each property</li> <li>-</li> </ul>	Within thirty (30) calendar days upon receipt of the Notice to Submit (NTS) from IPD.



	<p>Revised TOR incorporating the comments, if any, of the SVP-LAMG and/or EVP-IS</p> <ul style="list-style-type: none"> <li>- One (1) set for each property</li> </ul>	<p>Within ten (10) calendar days upon receipt of the NTR in any of the two (2) IPs.</p> <p>For succeeding revisions, if any, the Consultant shall be given five (5) calendar days per revision, up to two (2) revisions, within which to submit its revised TOR from receipt of NTR.</p>
5	<p>Presentation of the TOR to the RMIC for its approval of endorsement to the SSS</p>	<p>One (1) day, on the RMIC's scheduled meeting</p>
	<p>Revised TOR incorporating the comments of the RMIC, if any, as certified by the SVP for LAMG.</p>	<p>Within ten (10) calendar days from receipt of the NTR in any of the two (2) IPs and as certified by the Head, LAMG</p> <p>For succeeding revisions, if any, the Consultant shall be given five (5) calendar days per revision, up to two (2) revisions, within which to submit its revised TOR from receipt of NTR.</p>
6	<p>Presentation of the Final TOR to the SSC for its approval.</p> <ul style="list-style-type: none"> <li>- Three (3) sets hard copy of the final TOR for each property</li> <li>- Soft copy (USB storage device) of the written report</li> </ul>	<p>One (1) day, on the SSC's scheduled meeting</p>
	<p>Revised TOR incorporating the comments of the SSC, if any, as certified by the SVP for LAMG.</p>	<p>Within ten (10) calendar days from receipt of the NTR in any of the two (2) IPs and as certified by the SVP for LAMG.</p> <p>For succeeding revisions, if any, the Consultant shall be given five (5) calendar days per revision, up to two (2) revisions, within which to submit its revised TOR from receipt of NTR.</p>

9. References to the dates and times shall be based on Philippine Standard time. Should any of the above dates fall on a holiday, the deadline shall be extended to the same time on the immediately succeeding business day in Quezon City.
10. The Social Security System 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.



11. The Social Security System assumes no obligation to compensate or indemnify parties for any expense or loss that they may incur as a result of their participation in the procurement process nor does SSS guarantees that an award will be made as a result of this invitation. Furthermore, the SSS reserves the right to waive any defects or formality in the responses to the eligibility requirements and to this invitation and reserves the right to accept the proposal most advantageous to the agency.
12. For further information, please refer to:

**Bids and Awards Committee**

**The Secretariat**

2nd Floor, SSS Main Building

East Avenue, Diliman, Quezon City

Tel # (632) 8922-1070; 8709-7198 local 5492 or 6382

Email – [bac@sss.gov.ph](mailto:bac@sss.gov.ph)

13. Bidding Documents may be downloaded from PROCUREMENT tab at [www.sss.gov.ph](http://www.sss.gov.ph) starting **01 July 2024**.

  
**THE CHAIRPERSON**  
**BIDS & AWARDS COMMITTEE**

ref.: rei-sss-consulting-2024-005-HABU (3<sup>rd</sup> adv)



## ***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. **For procurement to be performed overseas, it shall be subject to the Guidelines to be issued by the GPPB.**



### 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.

However, for Contracting Parties to the Apostille Convention, the documents shall be authenticated through an apostille by the Competent Authority, except for countries identified by the Department of Foreign Affairs (DFA) that will still require legalization (red ribbon) by the relevant Embassy or Consulate.

A Contracting Party refers to a State that has joined the Apostille Convention, whether or not the Convention has entered into force for that State.



A Competent Authority refers to the authority designated by a Contracting Party that is competent to issue an apostille. A Contracting Party may designate one or more Competent Authorities and may designate Competent Authorities that are competent to issue an apostille for certain categories of public documents. Information about designated Competent Authorities may be found on the Apostille Section of the Hague Conference website under “Competent Authorities”.

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**. In case the deadline for submission of bids falls on a non-working day duly declared by the president, governor or mayor or other government official authorized to make such declaration, the deadline shall be the next working day.

## **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	<p>Hiring of Consultant to conduct the Highest and Best Use (HABU) study with Valuation of Development and Usufructuary Rights (DUR) and crafting of the Terms of Reference (TOR) for the recommended best development/investment option for each of the two (2) SSS investment properties (IPs), as follows:</p> <p>Lot 1 - Bonifacio Global City (BGC) property Lot 2 – FCA 7-ha property</p> <p>The SSS may ask the Consultant to assist in answering queries that may arise during the conduct of the bidding procedure for the approved development of SSS prime properties, from the pre-bid conference up to the evaluation/ranking of bids.</p> <p>The bidder shall submit the list of key personnel to be assigned to the following identified positions, however, only one (1) assigned personnel per position shall be rated for evaluation purposes. The winning bidder may assign additional personnel to complete the study without additional cost to SSS.</p> <p>The bidder who intends to bid for both Lots 1 and 2, must submit a different list of key personnel per Lot. Each Team per Lot must be composed of a Senior Officer, Financial Analyst, Technical Analyst, and Researcher.</p> <p>Below are the relevant educational background and functions for each position:</p> <table><tr><th>Key Personnel</th><th>Relevant Educational Background</th><th>Functions</th></tr><tr><td>Senior Officer</td><td rowspan="3">For Senior Officer, Financial Analyst and Technical Analyst or their equivalent positions:<ul style="list-style-type: none"><li>• Management</li><li>• Accountancy</li><li>• Business and Finance</li><li>• Law</li><li>• Economics</li><li>• Marketing</li><li>• Math</li><li>• Statistics</li><li>• Engineering</li><li>• Architecture</li></ul></td><td><ul style="list-style-type: none"><li>• Act as the team leader / manager of the project;</li><li>• Serve as the point person of the Consulting Firm;</li><li>• Shall be the one to present to the SSS / SSC concerned units the result of the firm’s study and recommended investment / development options</li></ul></td></tr><tr><td>Financial Analyst or equivalent position</td><td><ul style="list-style-type: none"><li>• Responsible for the preparation, analysis and finalization of financial projections and/or financial assumptions necessary for the computation and evaluation of the Internal Rate of Return (IRR), Net Present Value (NPV), Return on Investment (ROI), business valuation, and other necessary and/or relevant assumptions and financial components concerning the project and the different options of investment / development of the subject SSS properties</li></ul></td></tr><tr><td>Technical Analyst or equivalent position</td><td><ul style="list-style-type: none"><li>• Responsible to conduct / prepare market analysis on the location of the properties including similar adjacent locations for comparative / supportive data, for the different options of investment / development of the subject SSS properties</li></ul></td></tr></table>	Key Personnel	Relevant Educational Background	Functions	Senior Officer	For Senior Officer, Financial Analyst and Technical Analyst or their equivalent positions: <ul style="list-style-type: none"><li>• Management</li><li>• Accountancy</li><li>• Business and Finance</li><li>• Law</li><li>• Economics</li><li>• Marketing</li><li>• Math</li><li>• Statistics</li><li>• Engineering</li><li>• Architecture</li></ul>	<ul style="list-style-type: none"><li>• Act as the team leader / manager of the project;</li><li>• Serve as the point person of the Consulting Firm;</li><li>• Shall be the one to present to the SSS / SSC concerned units the result of the firm’s study and recommended investment / development options</li></ul>	Financial Analyst or equivalent position	<ul style="list-style-type: none"><li>• Responsible for the preparation, analysis and finalization of financial projections and/or financial assumptions necessary for the computation and evaluation of the Internal Rate of Return (IRR), Net Present Value (NPV), Return on Investment (ROI), business valuation, and other necessary and/or relevant assumptions and financial components concerning the project and the different options of investment / development of the subject SSS properties</li></ul>	Technical Analyst or equivalent position	<ul style="list-style-type: none"><li>• Responsible to conduct / prepare market analysis on the location of the properties including similar adjacent locations for comparative / supportive data, for the different options of investment / development of the subject SSS properties</li></ul>
Key Personnel	Relevant Educational Background	Functions									
Senior Officer	For Senior Officer, Financial Analyst and Technical Analyst or their equivalent positions: <ul style="list-style-type: none"><li>• Management</li><li>• Accountancy</li><li>• Business and Finance</li><li>• Law</li><li>• Economics</li><li>• Marketing</li><li>• Math</li><li>• Statistics</li><li>• Engineering</li><li>• Architecture</li></ul>	<ul style="list-style-type: none"><li>• Act as the team leader / manager of the project;</li><li>• Serve as the point person of the Consulting Firm;</li><li>• Shall be the one to present to the SSS / SSC concerned units the result of the firm’s study and recommended investment / development options</li></ul>									
Financial Analyst or equivalent position		<ul style="list-style-type: none"><li>• Responsible for the preparation, analysis and finalization of financial projections and/or financial assumptions necessary for the computation and evaluation of the Internal Rate of Return (IRR), Net Present Value (NPV), Return on Investment (ROI), business valuation, and other necessary and/or relevant assumptions and financial components concerning the project and the different options of investment / development of the subject SSS properties</li></ul>									
Technical Analyst or equivalent position		<ul style="list-style-type: none"><li>• Responsible to conduct / prepare market analysis on the location of the properties including similar adjacent locations for comparative / supportive data, for the different options of investment / development of the subject SSS properties</li></ul>									



	<div> <div>Researcher or equivalent position</div> <div>For Researcher: Graduate of any 4-year course</div> <div> <ul style="list-style-type: none"> <li>Responsible to collect, collate and coordinate the data obtained necessary for the completion of the project</li> </ul> </div> </div> <ul style="list-style-type: none"> <li>Key Personnel shall perform other necessary and/or incidental functions for the completion of the project</li> </ul>
1.3	No further instructions
2	<p><b>Eligibility Requirements:</b></p> <p><u>Legal Documents</u></p> <p>(i) PhilGEPS Certificate of Registration and Membership in accordance with Section 8.5.2 of the IRR. For procurement to be performed overseas, it shall be subject to the Guidelines to be issued by the GPPB.</p> <p><u>Technical Documents</u></p> <p>(ii) Provide a brief background or profile of the company.</p> <p>(iii) Statement of the prospective bidder of all its ongoing and completed government and private contracts of which there should be at least one (1) completed HABU study, one (1) completed DUR Valuation and one (1) completed TOR, including contracts awarded but not yet started, if any, within the period of ten (10) years. The statement shall include, for each contract, ALL the following mandatory details:</p> <ul style="list-style-type: none"> <li>(iii.1) the name and location of the contract;</li> <li>(iii.2) date of award of the contract;</li> <li>(iii.3) type and brief description of consulting services;</li> <li>(iii.4) consultant's role (whether main consultant, subconsultant, or partner in a JV)</li> <li>(iii.5) amount of contract;</li> <li>(iii.6) contract duration;</li> <li>(iii.7) contact person and number of client;</li> <li>(iii.8) Certificate of satisfactory completion or equivalent document issued by the client, in the case of a completed contract.</li> </ul> <p>Submission of certificate of satisfactory completion/acceptance or certificate of full payment issued by the listed contracting client(s) of the prospective bidder, involving at least one (1) HABU study, one (1) DUR Valuation and one (1) crafting of TOR, which may be independent of one another or completed under the same contract/s.</p>



	<p>The certificate(s) of satisfactory completion/acceptance must certify completion and/or acceptance of the listed project/contract, pertinent details of the project/contract such as, but not limited to, project title, project description/type/location of the project, role of the Consultant and scope of work done by the prospective bidder.</p> <p>The details of the certificate(s) submitted must correspond to the details indicated by the prospective bidder in its Statement of completed government and private contracts.</p> <p><b>The certificate(s) of satisfactory completion/acceptance submitted must pertain to at least one completed HABU study, one completed DUR Valuation and one completed TOR.</b></p> <p>The certificate of full payment must pertain to at least one completed HABU study, one completed DUR Valuation and one completed TOR, the details of which must correspond and/or support the details presented by the prospective bidder in its statement of completed government and private contracts.</p> <p>A prospective bidder that fails to submit the required certificate(s) of satisfactory completion/acceptance or certificate of full payment, as described above, shall be deemed <b>INELIGIBLE</b>.</p> <p>(iv) 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 the respective curriculum vitae of the key personnel indicating their respective positions in the performance of the project (form Supplied).</p> <p><b><u>Aside from the required key personnel who will be assigned to the project, the Consultant is also required to enumerate all technical personnel/professionals that are employed by the Consultant, either as a regular employee or on a per-project basis, including their respective Curriculum Vitae (form Supplied).</u></b></p> <p>(v) 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.</p> <p>(vi) Eligibility Document Submission Form (form Supplied)</p>
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2.1(a)(ii)	The statement of all ongoing and completed government and private contracts shall include all such contracts, which must show that the bidder has completed at least one (1) HABU study, at least one (1) DUR Valuation and at least one (1) TOR within the last ten (10) years prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	<p>The Certificate of Satisfactory Completion/Acceptance or Certificate of Full Payment issued by the contracting client of the prospective bidder certifying acceptance of the project and explicitly stating therein at least a satisfactory performance by the consultant, and must include all pertinent details of the project including project title, project description/type, location of the project, role of the Consultant, scope of work done by prospective bidder, etc.</p> <p>The required certificate of satisfactory completion/acceptance or certificate of full payment issued by the listed client(s) of the prospective bidder for the listed project(s) must be submitted, otherwise, the prospective bidder shall be deemed ineligible.</p>
4.2	<p>Each Bidder shall submit three (3) sets, as follows.</p> <p>1. One (1) Envelope marked ORIGINAL; and 2. Two (2) Envelopes marked COPY NO. ____ .</p>
4.3(c)	The Social Security System's Bids and Awards Committee shall be concerned with the Project.
4.3 (d)	<p>Hiring of Consultant to Conduct the Highest and Best Use (HABU) study with Valuation of Development and Usufructuary Rights (DUR) and crafting of Terms of Reference (TOR) for the recommended and approved best development/investment option for each of the following SSS Prime Investment Properties (IPs):</p> <p>a. Bonifacio Global City (BGC) property b. FCA 7-has. Property, Pasay City</p>
5	<p>The address for submission of eligibility documents is:</p> <p><b>BIDS AND AWARDS COMMITTEE</b> <i>2<sup>nd</sup> Floor, SSS Main Building</i> <i>East Avenue, Diliman, Quezon City</i></p> <p>The deadline for submission of eligibility documents is indicated in the Advertisement.</p>
8.1	<p>The place of opening of eligibility documents is at:</p> <p><b>BIDS AND AWARDS COMMITTEE</b> <i>2<sup>nd</sup> Floor, SSS Main Building</i> <i>East Avenue, Diliman, Quezon City</i></p> <p>The date and time of opening of eligibility documents is indicated in the Advertisement.</p>

9.1	To qualify for eligibility, consultancy firm shall have completed at least one (1) HABU study, at least one (1) DUR valuation and at least one (1) TOR on real property development located in any Central Business District (CBD) nationwide within the past ten (10) years prior to the submission of eligibility documents.																		
9.2	<p>The following criteria and rating system shall be used for the short listing of consultants:</p> <table><tr><td></td><td>Criteria</td><td>Points</td></tr><tr><td>1</td><td>Length of Existence of the Consulting Firm</td><td>20</td></tr><tr><td>2</td><td>Applicable Experience of the Consulting Firm</td><td>40</td></tr><tr><td>3</td><td>Qualification of Key Personnel</td><td>30</td></tr><tr><td>4</td><td>Current Workload Relative to Capacity</td><td>10</td></tr><tr><td colspan="2">Total Points</td><td>100</td></tr></table> <p>The minimum score required to pass is <u>80</u> points.</p>		Criteria	Points	1	Length of Existence of the Consulting Firm	20	2	Applicable Experience of the Consulting Firm	40	3	Qualification of Key Personnel	30	4	Current Workload Relative to Capacity	10	Total Points		100
	Criteria	Points																	
1	Length of Existence of the Consulting Firm	20																	
2	Applicable Experience of the Consulting Firm	40																	
3	Qualification of Key Personnel	30																	
4	Current Workload Relative to Capacity	10																	
Total Points		100																	



ELIGIBILITY DOCUMENTS SUBMISSION FORM

[Date]

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

In connection with your Request for Expression of Interest dated [insert date] for [Title of Project], [Name of Consultant] hereby expresses interest in participating in the eligibility and short listing for said Project and submits the attached eligibility documents in compliance with the Eligibility Documents therefor.

In line with this submission, we certify that:

- a) [Name of Consultant] is not blacklisted or barred from bidding by the GoP or any of its agencies, offices, corporations, LGUs, or autonomous regional government, including foreign government/foreign or international financing institution; and
- b) Each of the documents submitted herewith is an authentic copy of the original, complete, and all statements and information provided therein are true and correct.

We acknowledge and accept the Procuring Entity’s right to inspect and audit all records relating to our submission irrespective of whether we are declared eligible and short listed or not.

We further acknowledge that failure to sign this Eligibility Document Submission Form shall be a ground for our disqualification.

Yours sincerely,

Signature  
Name and Title of Authorized Signatory  
Name of Consultant  
Address





STATEMENT OF CONSULTANT SPECIFYING ITS NATIONALITY

[Date]

SOCIAL SECURITY SYSTEM

East Avenue, Diliman, Quezon City

Ladies/Gentlemen:

This is to certify that (Name of Bidder) is :

- a. (state Nationality) -owned company,
- b. Select one and delete the others:
  - ( ) citizens/sole proprietorships with at least ( )% interest or outstanding capital stockbelonging to citizens of the Philippines
  - ( ) cooperatives with at least ( )% interest or outstanding capital stock belonging tocitizens of the Philippines
  - ( ) partnerships or organizations with at least ( )% interest or outstanding capital stockbelonging to citizens of the Philippines.

Below are the list of consultants/professionals with respective positions/designations who will actually perform the service are registered professionals authorized by the appropriate regulatory body to practice those professions and alliedprofessions:

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

This statement is being issued in compliance with the eligibility requirements for the bidding of the *Hiring of Consultant to Conduct the Highest and Best Use (HABU) study with Valuation of Development and Usufructuary Rights (DUR) and Crafting of the Terms of Reference (TOR) for the Development of SSS Prime Investment Properties (IPs).*

Attached for your reference are the Curriculum Vitae of the above-mentioned personnel.

Yours sincerely,  
Signature  
Name and Title of Authorized Signatory  
Name of Consultant  
Address



**LIST OF ALL TECHNICAL PERSONNEL/PROFESSIONALS EMPLOYED BY THE CONSULTANT**

NAME	POSITION	STATUS OF EMPLOYMENT (Regular/Job-Order/Contractual)	Date of Employment

*Attach Curriculum Vitae.*

**STATEMENT OF ON-GOING GOVERNMENT AND PRIVATE CONTRACTS WITH ATTACHED SUPPORTING DOCUMENTS (i.e. CONTRACTS)**

NAME & LOCATION OF CONTRACT	DATE OF AWARD OF THE CONTRACT	CONTRACT DURATION	AMOUNT OF CONTRACT	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES (Identify type of study/services, e.g. HABU, DUR, TOR, etc.)	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CLIENT'S CONTACT PERSON AND CONTACT NUMBER

**STATEMENT OF COMPLETED GOVERNMENT AND PRIVATE CONTRACTS WITH ATTACHED SUPPORTING DOCUMENTS (i.e. CONTRACTS AND PROOF OF ACCEPTANCE)**

NAME & LOCATION OF CONTRACT	DATE OF AWARD OF THE CONTRACT	CONTRACT DURATION	AMOUNT OF CONTRACT & PROJECT CONSTRUCTION COST	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES (Identify type of study/services, e.g. HABU, DUR, TOR, etc.)	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CLIENT'S CONTACT PERSON AND CONTACT NUMBER	CERTIFICATE OF SATISFACTORY COMPLETION OR EQUIVALENT DOCUMENT ISSUED BY THE CLIENT

*Attach certificate of satisfactory completion or certificate of full payment which contains the required project details enumerated in the eligibility requirements.*



