



**SOCIAL SECURITY SYSTEM**

# **PHILIPPINE BIDDING DOCUMENTS**

**Fifth Edition**

**August 2016**

## **PART I**

# **Procurement of CONSULTING SERVICES**

**HIRING OF CONSULTANT FOR  
ESTABLISHING CERTIFIABLE ISO 27001:2022  
INFORMATION SECURITY MANAGEMENT  
SYSTEM INTEGRATED WITH ISO 9001:2015  
QUALITY MANAGEMENT SYSTEM OF THE  
SOCIAL SECURITY SYSTEM**

**REI-SSS-CONSULTING-2025-002**

**Government of the Republic of the Philippines**

**FEBRUARY 2025**

A handwritten signature in blue ink, appearing to read 'H. Navarro'.

**HELEN L. NAVARRO**  
Chairperson, TWG

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

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**REQUEST FOR EXPRESSION OF INTEREST  
REI-SSS-CONSULTING-2025-002**

***HIRING OF CONSULTANT FOR ESTABLISHING CERTIFIABLE ISO  
27001:2022 INFORMATION SECURITY MANAGEMENT SYSTEM  
INTEGRATED WITH ISO 9001:2015 QUALITY MANAGEMENT SYSTEM  
OF THE SOCIAL SECURITY SYSTEM***

1. The ***Social Security System***, through the 2025 Corporate Operating Budget under MOOE with Code PAP 2025-0273 of the Annual Procurement Plan (APP) intends to apply the sum of One Million Seven Hundred Twenty Thousand Three Hundred Twenty Pesos (₱1,720,320.00) being the Approved Budget for the Contract (ABC) to payments under the contract for **Hiring of Consultant for Establishing Certifiable ISO 27001:2022 Information Security Management Systems (ISMS) Integrated with ISO 9001:2015 Quality Management System (QMS) of the Social Security System**, broken down as follows:

Year 1 – ₱931,840.00

Year 2 – ₱788,480.00

Bids received in excess of ₱1,720,320.00 as ABC shall be automatically rejected at the opening of the financial proposals.

2. The ***Social Security System*** now calls for the submission of eligibility documents for the services of a Consultant that will assist the Social Security System in the documentation training and assessment for the establishment and implementation of certifiable ISO 27001:2022 ISMS integrated with ISO 9001:2015 QMS requirements.

Eligibility documents of interested consultants must be duly received by the BAC Secretariat **on or before 04 March 2025 (Tuesday) not later than 2:00 p.m. at the Bidding Room, 2<sup>nd</sup> Floor, SSS Main Building, East Avenue, 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 consultant must have undertaken similar consulting services and/or training services in the last ten (10) years, to at least three (3) institutions, one of which is a government agency, and supported by certificate of satisfactory service/certificate of acceptance or similar document showing completion of the service provided.

**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 03 March 2025, 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.

- Interested bidders may obtain further information from SSS and inspect the Bidding Documents at the address in the last item of the ITB from Monday to Friday, 8:00 a.m. to 5:00 p.m.
- A complete set of Bidding Documents may be acquired by interested bidders starting 21 February 2025** up to the scheduled submission & receipt of bids from the address stated in the last item of the ITB.

Payment of ₱5,000.00 for the Bidding Documents shall be paid by the Shortlisted Consultant/s only.

**The mode of payment will be on a cash basis payable at the SSS Cash Management 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 Procuring Entity, provided that Bidders shall pay the applicable fee for the Bidding Documents not later than the **submission of their bids**.

- 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 bidder who will be entitled to submit bids. The criteria and rating system for short listing are:

Criteria	Percentage
a. Quality of Personnel	40%
b. Experience and Capability of Consultant	40%
c. Current workload relative to capacity	20%
<b>TOTAL</b>	<b>100%</b>

**Minimum Passing Rate for shortlisting 70%**

- 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.

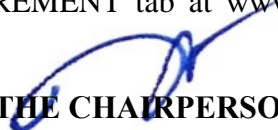
- The SSS shall evaluate bids using the *Quality-Cost Based Evaluation/Selection (QCBE/QCBS)* procedure. The weights to be allocated for the Technical and Financial Proposals are indicated in Clause 25.1, Section III, Bid Data Sheet, Part II of the Bidding Documents. The criteria and rating system for 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.
- The contract shall be completed upon the Social Security System’s acceptance of the Terminal Report and Integrated Management System (IMS) “Certifiable” status against the ISO 27001:2022 and ISO 9001:2015 standards, or their latest versions if released prior to the start of the deployment/implementation training, and following below schedule of milestones:

Year 1	Issuance of NTP	
	Gap Analysis	Within 30 calendar days from SSS' Receipt of consultant-signed Notice to Proceed (NTP)
	IMS Documentation	Within 180 calendar days from SSS' receipt of consultant-signed NTP but not earlier than SSS' acceptance of Gap Analysis Report
Year 2	Deployment/Implementation Training	Within 240 calendar days from SSS' receipt of consultant-signed NTP but not earlier than the SSS' Acceptance of complete of Gap Analysis Report
	IMS Audit	Within 90 calendar days from the completion of trainings
	Root Cause Analysis and Corrective/Preventive Action	within 90 calendar days from completion of IMS audit and SSS' acceptance of IMS Audit Report
	Management Review	Within 15 calendar days from completion of Root Cause Analysis (RCA)/ Corrective Action and Preventive Action (CAPA) verification
	Pre-Certification Assessment	within 15 calendar days from Management Review
	Issuance of Terminal Report and Certifiable Status Certificate	Within 15 calendar days from completion of Pre-Certification Assessment

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 of the immediately succeeding business day in Quezon City.
10. The SSS 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 SSS 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 guarantee 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 & Awards Committee**  
**The Secretariat**  
 2<sup>nd</sup> Flr., SSS Main Bldg., East Ave., Diliman, Q.C.  
 Tel No. (632) 8922-1070; 8709-7198 local 3420 or 3425  
 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 21 February 2025.



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

ref.: rei-sss-consulting- 2025-002-ISO Certification Body



*Section II. Eligibility Documents*

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## 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) total mandays for the duration of the contract;
  - (ii.7) contract duration; and
  - (ii.8) 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 shortlisted 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 fall 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 0 shall be declared “Late” and shall not be accepted by the Procuring Entity. The BAC shall record in the minutes of submission and opening of eligibility documents, the Bidder’s name, its representative and the time the eligibility documents were submitted late.

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

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

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

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

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

- 8.2. Letters of withdrawal shall be read out and recorded during the opening of eligibility documents and the envelope containing the corresponding withdrawn eligibility documents shall be returned unopened to the withdrawing prospective bidder.
- 8.3. The eligibility documents envelopes and modifications, if any, shall be opened one at a time, and the following read out and recorded:
  - (a) the name of the prospective bidder;
  - (b) whether there is a modification or substitution; and
  - (c) the presence or absence of each document comprising the eligibility documents vis-à-vis a checklist of the required documents.



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

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

- 9.1. Only prospective bidders whose submitted contracts are similar in nature and complexity to the contract to be bid as provided in the **EDS** shall be considered for short listing.
- 9.2. The BAC shall draw up the short list of prospective bidders from those declared eligible using the detailed set of criteria and rating system to be used as 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***

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# Eligibility Data Sheet

Eligibility Documents	
1.2	<p>Hiring of Consultant for Establishing Certifiable ISO 27001:2022 ISMS Integrated with ISO 9001:2015 QMS of the Social Security System.</p> <p>Interested Consultant must have undertaken similar ISO consulting services and/or training services in the last three (3) years, one of which is a government agency, and supported by:</p> <ul style="list-style-type: none"> <li>- ISO attestation/certificate or</li> <li>- certificate of satisfactory completion of service or similar document showing completion of the service provided</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) 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 <b>EDS</b>. The statement shall include, for each contract, the following:</p> <ul style="list-style-type: none"> <li>(ii.1) the name and location of the contract;</li> <li>(ii.2) date of award of the contract;</li> <li>(ii.3) type and brief description of consulting services;</li> <li>(ii.4) consultant’s role (whether main consultant, sub-consultant, or partner in a JV)</li> <li>(ii.5) amount of contract;</li> <li>(ii.6) total mandays (amount of work that can be done by one person within one day) for the duration of the contract;</li> <li>(ii.7) contract duration; and</li> <li>(ii.8) certificate of satisfactory completion or equivalent document specified in the <b>EDS</b> issued by the client, in the case of a completed contract;</li> </ul> <p>(iii) Statement of the consultant specifying its nationality and confirming that those who will actually perform the service are registered</p>



	<p>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 (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.</u></b></p> <p>(iv) 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>(v) Eligibility Document Submission Form (form Supplied)</p>
2.1(a)(ii)	The statement of all ongoing and completed government and private contracts including awarded but not yet started, <i>if any</i> , shall include all such contracts within ten (10) years prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.8)	<p>Acceptable proofs of satisfactory completion of completed contracts:</p> <ul style="list-style-type: none"> <li>- ISO attestation/certificate or</li> <li>- certificate of satisfactory completion of service or similar document showing completion of the service provided</li> </ul>
4.2	<p>Each Bidder shall submit three (3) sets.</p> <ol style="list-style-type: none"> <li>1. One (1) Envelope marked ORIGINAL; and</li> <li>2. Two (2) Envelopes marked COPY NO.</li> </ol>
4.3 (c)	The Social Security System's Bids and Awards Committee shall be concerned with the Project.
4.3 (d)	<p>Project Name:</p> <p>Hiring of Consultant for Establishing Certifiable 27001:2022 Information Security Management Systems (ISMS) Integrated with ISO 9001:2015 Quality Management System (QMS) of the Social Security System</p>
5	<p>The address for submission of eligibility documents is at:</p> <p><b>BIDS AND AWARDS COMMITTEE</b>  2<sup>nd</sup> Floor, SSS Main Building  East Avenue, Diliman, Quezon City</p> <p><b>The deadline for submission of eligibility documents is indicated in the Advertisement.</b></p>

8.1	<p>The place of opening of eligibility documents is at:</p> <p><b>BIDS AND AWARDS COMMITTEE</b>  <i>Bidding Room, 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	Similar contracts shall refer to Consultant with similar consulting and/or training services related to ISO 9001:2015 and ISO 27001:2022.																																																
9.2	<p>The following criteria and rating system shall be used for the short listing of consultants:</p> <p><b>1. Quality of Personnel to be Assigned as Consultant (40 pts. subtotal)</b></p> <p>1.1 Experience as Consultant (15 pts. highest score)</p> <table> <tr> <td>100% of assigned Consultants have more than three (3) years of similar experience</td><td>15</td></tr> <tr> <td>75% of assigned Consultants have at least three (3) years of similar experience</td><td>10</td></tr> <tr> <td>50% of assigned Consultants have at least three (3) years of similar experience</td><td>5</td></tr> <tr> <td>No assigned Consultant has at least three (3) years of similar experience</td><td>0</td></tr> </table> <p>1.2 Training in QMS and ISMS requirements (5 pts. highest score)</p> <table> <tr> <td>100% of assigned Consultants have completed at least 16 training hours in ISO 9001 and 27001 requirements</td><td>5</td></tr> <tr> <td>50% of assigned Consultants have at least 16 training hours in ISO 9001 and 27001 requirements</td><td>3</td></tr> <tr> <td>All assigned Consultants have not completed the minimum 16 training hours in ISO 9001 and 27001 requirements</td><td>0</td></tr> </table> <p>1.3 Lead Auditor Certification (5 pts. highest score)</p> <table> <tr> <td>100% of assigned Consultants are Certified as Lead Auditor for both ISO 9001 and ISO 27001</td><td>5</td></tr> <tr> <td>50% of assigned Consultants are Certified as Lead Auditor either for ISO 9001, or ISO 27001, or both</td><td>3</td></tr> <tr> <td>No Consultant holds ISO 9001 or ISO 27001 Lead Auditor Certification</td><td>0</td></tr> </table> <p>1.4 Background in providing consultancy to similar business/industries (15 pts. highest score)</p> <table> <tr> <td>Has been a Consultant to the Public, Financial Sector, or both (100% of the team)</td><td>15</td></tr> <tr> <td>Has been a Consultant to the Public, Financial Sector, or both (75% of the team)</td><td>10</td></tr> <tr> <td>Has been a Consultant to the Public, Financial Sector, or both (50% of the team)</td><td>5</td></tr> <tr> <td>Has never been a Consultant to the Public and/or Financial Sector</td><td>0</td></tr> </table> <p><b>2. Experience and Capability of Consulting Company (40 pts. subtotal)</b></p> <p>2.1 Experience of the Consulting Company (15 pts. highest score)</p> <table> <tr> <td>More than 5 years</td><td>15</td></tr> <tr> <td>3-5 years</td><td>10</td></tr> <tr> <td>2 years</td><td>5</td></tr> <tr> <td>Less than 2 years</td><td>0</td></tr> </table> <p>2.2 Capability of the Consulting Company (25 pts. highest score)</p> <table> <tr> <td colspan="2">Capability (15 pts. highest score)</td></tr> <tr> <td>Has been a Consultant to the Public, Financial Sector, or both in the last 6 years</td><td>15</td></tr> <tr> <td>Has been a Consultant to the Public, Financial Sector, or both in the last 3-5 years</td><td>10</td></tr> <tr> <td>Has been a Consultant to the Public, Financial Sector, or both in the last 2 years</td><td>5</td></tr> <tr> <td>Has never been a Consultant to the Public and/or Financial Sector</td><td>0</td></tr> <tr> <td colspan="2">Percentage of similar or larger on-going projects including projects awarded but not yet started (10 pts. highest score)</td></tr> </table>	100% of assigned Consultants have more than three (3) years of similar experience	15	75% of assigned Consultants have at least three (3) years of similar experience	10	50% of assigned Consultants have at least three (3) years of similar experience	5	No assigned Consultant has at least three (3) years of similar experience	0	100% of assigned Consultants have completed at least 16 training hours in ISO 9001 and 27001 requirements	5	50% of assigned Consultants have at least 16 training hours in ISO 9001 and 27001 requirements	3	All assigned Consultants have not completed the minimum 16 training hours in ISO 9001 and 27001 requirements	0	100% of assigned Consultants are Certified as Lead Auditor for both ISO 9001 and ISO 27001	5	50% of assigned Consultants are Certified as Lead Auditor either for ISO 9001, or ISO 27001, or both	3	No Consultant holds ISO 9001 or ISO 27001 Lead Auditor Certification	0	Has been a Consultant to the Public, Financial Sector, or both (100% of the team)	15	Has been a Consultant to the Public, Financial Sector, or both (75% of the team)	10	Has been a Consultant to the Public, Financial Sector, or both (50% of the team)	5	Has never been a Consultant to the Public and/or Financial Sector	0	More than 5 years	15	3-5 years	10	2 years	5	Less than 2 years	0	Capability (15 pts. highest score)		Has been a Consultant to the Public, Financial Sector, or both in the last 6 years	15	Has been a Consultant to the Public, Financial Sector, or both in the last 3-5 years	10	Has been a Consultant to the Public, Financial Sector, or both in the last 2 years	5	Has never been a Consultant to the Public and/or Financial Sector	0	Percentage of similar or larger on-going projects including projects awarded but not yet started (10 pts. highest score)	
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	More than 50% of total contracts are similar or larger (ongoing and awarded but not yet started)	10
	At least 50% of total contracts are similar or larger (ongoing and awarded but not yet started)	5
	No similar or larger projects (ongoing and awarded but not yet started)	0
	<b>3.Current Workload Relative to Capacity (20 pts. subtotal)</b>	
	<b>Formula:</b>	
	$\frac{\text{Total Remaining Mandays from Existing Contracts}}{\text{Total Number of Auditors}}$	
	A lower yielded score is considered favorable as it signifies the availability of more resources for the project.	
	With highest capacity among other bidders based on lowest computed score or lone bidder	20
	With neither the highest nor lowest capacity among bidders based on computed score	10
	With lowest capacity among other bidders based on highest computed score	5
<b>TOTAL SCORE = 100 POINTS (100%)</b>		
The minimum score required to pass is <b><u>70%</u></b> .		



**ELIGIBILITY DOCUMENTS SUBMISSION FORM**

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*[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 CONSUTANT 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. Choose one and delete the other:
  - ( ) citizens/sole proprietorships with at least (\_\_\_%) interest or outstanding capital stock belonging to citizens of the Philippines
  - ( ) cooperatives with at least (\_\_\_%) interest or outstanding capital stock belonging to citizens of the Philippines
  - ( ) partnerships or organizations with at least (\_\_\_%) interest or outstanding capital stock belonging to citizens of the Philippines.

The company has a total of \_\_\_\_\_ part-time and regular auditors, listed below, who may be assigned to actually perform the service:

Name	Check if applicable				
	With at least three (3) years of similar experience	With at least a total of 16 hours training in QMS and ISMS Requirements	With ISO 9001 and 27001 Lead Auditor Certification	With background in giving consultancy to similar business/industries	
				Public Sector	Financial Sector

\*add rows as necessary\*

This statement is being issued in compliance with the eligibility requirements for the bidding of the *Hiring of Consultant for Establishing Certifiable 27001:2022 ISMS Integrated with ISO 9001:2015 QMS of the Social Security System*.

Attached for your reference are the **Company Profile** and **Curriculum Vitae** of the above-mentioned personnel.

Yours sincerely,

Signature  
Name and Title of Authorized Signatory  
Name of Consultant  
Address



STATEMENT OF ON-GOING GOVERNMENT AND PRIVATE CONTRACTS INCLUDING CONTRACTS AWARDED BUT NOT YET STARTED

NAME & LOCATION OF THE CONTRACT	CONTACT PERSON, CONTACT NUMBER AND E-MAIL ADDRESS	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV)	AMOUNT OF CONTRACT	TOTAL MANDAYS FOR THE DURATION OF THE CONTRACT	TOTAL REMAINING MANDAYS	CONTRACT DURATION	
							AWARD DATE (mm/dd/yyyy)	END DATE (mm/dd/yyyy)
A. Government								
B. Private								



**STATEMENT OF COMPLETED GOVERNMENT AND PRIVATE CONTRACTS**  
**WITH ATTACHED SUPPORTING DOCUMENTS**  
*(i.e. ISO 9001:2015/27001:2022 Certificate and/or Certificate of Completion of Contract/Service)*

NAME & LOCATION OF THE CONTRACT	CONTACT PERSON, CONTACT NUMBER AND E-MAIL ADDRESS	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV)	AMOUNT OF CONTRACT (PHP)	TOTAL MANDAYS FOR THE DURATION OF THE CONTRACT	CONTRACT DURATION		CERTIFICATE OF SATISFACTORY COMPLETION OR EQUIVALENT DOCUMENT ISSUED BY THE CLIENT  (check if attached)
						AWARD DATE	END DATE	
<b>A. Government</b>								
								<input type="checkbox"/>
								<input type="checkbox"/>
								<input type="checkbox"/>
<b>B. Private</b>								
								<input type="checkbox"/>
								<input type="checkbox"/>
								<input type="checkbox"/>

