



**REQUEST FOR EXPRESSION OF INTEREST**  
**No. 2023-017**

**PROCUREMENT FOR THE SERVICES OF A CONSULTING FIRM TO DEVELOP THE STRATEGIC ROADMAP FOR BANABA**

1. The Government of the Philippines (GoP) has received a *Grant* from the *United Nations Development Program (UNDP)* through the *ABS Project* toward the cost of *Four Million (P4,000,000.00)*, and it intends to apply part of the proceeds of this *Grant* to payments under the contract for the *Procurement for the Services of a Consulting Firm to Develop the Strategic Roadmap for Banaba*.
2. The Biodiversity Management Bureau now calls for the submission of eligibility documents for the subject services. Eligibility documents of interested consultants must be duly received by the BAC Secretariat on or before *June 1, 2023* not later than *1:00pm* at the *BAC Secretariat at the Ninoy Aquino Parks and Wildlife Center, Quezon Avenue, Diliman, Quezon City*. Applications for eligibility will be evaluated based on a non-discretionary "pass/fail" criterion.
3. Interested bidders may obtain further information from BMB-BAC Secretariat and inspect the Bidding Documents at the address given below from Monday to Friday, 8:00 a.m. to 5:00p.m.
4. A complete set of Bidding Documents may be acquired by interested Bidders on *May 18, 2023* from the address below.

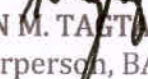
It may also be downloaded free of charge from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the website of the Procuring Entity, provided that Bidders shall pay the applicable fee for the Bidding Documents not later than the submission of their bids.

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 top five (5) prospective bidders who will be entitled to submit bids. The criteria and rating system for shortlisting are:

<i>CRITERIA</i>	<i>WEIGHT</i>
<i>1. Track Record of Consulting Firm</i>	<i>70</i>
<i>2. Qualification of Team Composition</i>	<i>30</i>
<i>TOTAL</i>	<i>100</i>
<i>PASSING RATE</i>	<i>70</i>

6. Bidding will be conducted in accordance with relevant procedures for open competitive bidding as specified in the IRR of RA 9184 with some amendments, as stated in these bidding documents and is open to all bidders from eligible source countries as defined in the applicable guidelines of the United Nations Development Programme (UNDP).
7. The Procuring Entity shall evaluate bids using the *Quality Based Evaluation (QBE)*, procedure. The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders.
8. The contract shall be completed within seven (7) months.
9. The *Biodiversity Management Bureau* reserves the right to reject any and all bids, declare a failure of bidding, or not award the contract at any time prior to contract award in accordance with Section 41 of RA 9184 and its IRR, without thereby incurring any liability to the affected bidder or bidders.
10. For further information, please refer to:

*The Head, BAC Secretariat  
Biodiversity Management Bureau  
Ninoy Aquino Parks and Wildlife Center  
Quezon Avenue, Diliman, Quezon City  
Telephone No. (02) 8924-6031 to 35 local 221  
E-mail: [bacsec@bmb.gov.ph](mailto:bacsec@bmb.gov.ph)*

  
ANSON M. TALTAG  
Chairperson, BAC





**DEPARTMENT OF ENVIRONMENT AND NATURAL RESOURCES  
BIODIVERSITY MANAGEMENT BUREAU**

QUEZON AVE., DILIMAN, QUEZON CITY

Tel. No. (632) 8 924 6031-25 | Fax (632) 8 924 0109, (632) 8 920 4417

Website: [www.bmb.gov.ph](http://www.bmb.gov.ph) | Email: [bmb@bmb.gov.ph](mailto:bmb@bmb.gov.ph)

# **BIDDING DOCUMENTS**

**“PROCUREMENT FOR THE SERVICES  
OF A CONSULTING FIRM TO DEVELOP  
THE STRATEGIC ROADMAP FOR  
BANABA”**

**ABC: P4,000,000.00**

**PART I**

**BIDS AND AWARDS  
COMMITTEE**

# TABLE OF CONTENTS

## PART I

SECTION 1. REQUEST FOR EXPRESSION OF INTEREST.....	2
SECTION II. ELIGIBILITY DOCUMENTS.....	11
SECTION III. ELIGIBILITY DATA SHEET .....	17

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



## REQUEST FOR EXPRESSION OF INTEREST

No. 2023-017

### PROCUREMENT FOR THE SERVICES OF A CONSULTING FIRM TO DEVELOP THE STRATEGIC ROADMAP FOR BANABA

1. The Government of the Philippines (GoP) has received a *Grant* from the *United Nations Development Program (UNDP)* through the *ABS Project* toward the cost of *Four Million (P4,000,000.00)*, and it intends to apply part of the proceeds of this *Grant* to payments under the contract for the *Procurement for the Services of a Consulting Firm to Develop the Strategic Roadmap for Banaba*.
2. The Biodiversity Management Bureau now calls for the submission of eligibility documents for the subject services. Eligibility documents of interested consultants must be duly received by the BAC Secretariat on or before *May 30, 2023* not later than *1:00pm* at the *BAC Secretariat at the Ninoy Aquino Parks and Wildlife Center, Quezon Avenue, Diliman, Quezon City*. Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion.
3. Interested bidders may obtain further information from BMB-BAC Secretariat and inspect the Bidding Documents at the address given below from Monday to Friday, 8:00 a.m. to 5:00p.m.
4. A complete set of Bidding Documents may be acquired by interested Bidders on *May 18, 2023* from the address below.

It may also be downloaded free of charge from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the website of the Procuring Entity, provided that 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 top five (5) prospective bidders who will be entitled to submit bids. The criteria and rating system for shortlisting are:

<i>CRITERIA</i>	<i>WEIGHT</i>
<i>1. Track Record of Consulting Firm</i>	<i>70</i>
<i>2. Qualification of Team Composition</i>	<i>30</i>
<i>TOTAL</i>	<i>100</i>
<i>PASSING RATE</i>	<i>70</i>

6. Bidding will be conducted in accordance with relevant procedures for open competitive bidding as specified in the IRR of RA 9184 with some amendments, as stated in these bidding documents and is open to all bidders from eligible source countries as defined in the applicable guidelines of the United Nations Development Programme (UNDP).
7. The Procuring Entity shall evaluate bids using the *Quality Based Evaluation (QBE)*, procedure. The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders.
8. The contract shall be completed within seven (7) months.
9. The *Biodiversity Management Bureau* reserves the right to reject any and all bids, declare a failure of bidding, or not award the contract at any time prior to contract award in accordance with Section 41 of RA 9184 and its IRR, without thereby incurring any liability to the affected bidder or bidders.
10. For further information, please refer to:

*The Head, BAC Secretariat  
Biodiversity Management Bureau  
Ninoy Aquino Parks and Wildlife Center  
Quezon Avenue, Diliman, Quezon City  
Telephone No. (02) 8924-6031 to 35 local 221  
E-mail: [bacsec@bmb.gov.ph](mailto:bacsec@bmb.gov.ph)*

**ANSON M. TAGTAG**  
Chairperson, BAC



## TERMS OF REFERENCE

Implementing the National Framework on Access and Benefit Sharing of Genetic Resources and Associated Traditional Knowledge in the Philippines

### PROCUREMENT OF THE SERVICES OF A CONSULTING FIRM TO DEVELOP THE STRATEGIC ROADMAP FOR BANABA

Seven (7) Months

#### I. Background and Rationale

The Department of Environment and Natural Resources – Biodiversity Management Bureau (DENR-BMB), with support from the United Nations Development Program (UNDP) is implementing the six-year project, *Implementing the National Framework on Access and Benefit Sharing of Genetic Resources and Associated Traditional Knowledge in the Philippines*. It aims to strengthen the implementation of the Nagoya Protocol (NP) in the Philippines through strengthening the national Access and Benefit Sharing (ABS) framework, building national and local capacities, and developing critical experience in ABS agreements. The project seeks to increase economic opportunity and biodiversity conservation for local communities and indigenous peoples stemming from fair and equitable sharing of biodiversity benefits. Further, the project will develop bio-products or bio-based products from local genetic resources of Banaba (*Lagerstroemia spectosa*) in Region 3.

To lay the foundation for bio-product development and viable ABS agreements for Banaba, a gender-smart and ABS-compliant value chain<sup>1</sup> mapped with a strategic development roadmap for the species must be developed. The gender-smart value chain will identify and analyze the activities that could add value to the bio-products, the role of women, men, and other stakeholders in the value chain; and the issues and opportunities as the basis for possible interventions. Priority interventions along the value chain will form part of the targets in the strategic roadmap for the identification and creation of benefits based on genetic resource development. The roadmap will represent the direction of stakeholders' priorities towards high-value product development (e.g., medicine, industrial, cosmetics, etc.) and commercialization of identified genetic resources.

Traditional value chains in the country have been developed to a certain degree. However, value chains where transactions are in line with the Nagoya Protocol on Access and Benefit Sharing (ABS value chains) and where social groups such as women and men benefit fairly and equally from ABS transactions (gender smart ABS value chains) are still inexistent. Developing such not only ensures fair and equitable sharing of benefits, and linkage of the private sector, stakeholders from research and development, governments and indigenous peoples, and local communities (IPLCs) but also opportunities to achieve gender equality and women empowerment along the whole value chain.

<sup>1</sup> *Gender Smart ABS Value Chain* is an approach that guides the transformation of ABS value chain to ensure women, men and youth, elderly benefit fairly and equally from ABS transaction. (Source: Mainstreaming Gender into ABS Value Chains Gender Toolkit)

*Gender Responsive* is defined as the result of the action addressed differential needs of men or women and equitable distribution of benefits, resources, status, and rights but did not address root causes of inequalities in their lives. (Source: UNDP Guide to Gender Mainstreaming)



## **II. Objectives**

The objective of the consultancy service is to engage a firm to conduct an in-depth value chain analysis, road mapping and identifying commercialization potential of Banaba through conduct of stakeholders' consultations, validations, Focus Group Discussions (FGD) and Key Informant Interviews (KII). These activities are expected to come up with a comprehensive report based on GEF-UNDP-DENR standards.

Results from this engagement will directly support the Project in achieving Project Results Indicator 4 (ABS Agreements); Indicator 9 (Potential ABS products identified and tested for potential commercial application); and Indicator 11 (Gender-smart and ABS-compliant value chain for identified genetic resources). Moreover, this engagement will directly contribute to realizing Project Outputs 3.1 (Research and development conducted for Pili and Banaba); and 3.2 (Strategic roadmap for the identification and creation of benefits based on genetic resource development).

## **III. Scope of Work**

The project intends to engage the services of a consultancy firm to create strategic roadmaps for the identification and creation of benefits based on genetic resource development for Banaba in Region 3 within 7 months. These strategic roadmaps will integrate gender-smart and ABS-compliant value chains. This will directly contribute to the achievement of the Project Results Framework Indicator 11 and Output 3.2.

The consultancy firm is expected to conduct an in-depth value chain analysis and road mapping, identify potential products ready for commercialization, conduct a series of stakeholders' consultations and validations, gather relevant data through Focus Group Discussions (FGD) and Key Informant Interviews (KII), conduct gender analysis on access and benefit sharing of Banaba, and submit comprehensive reports based on GEF-UNDP-DENR standards and ABS Project Management Unit's suggestions and recommendations.

The scope of work of this Terms of Reference is beyond the optimum in-house capability of the procuring entity and is consistent with the Government's policy not to compete with the private sector as integrated in Item 2 of Annex "B" of the 2016 Implementing Rules and Regulation of RA 9184.

## **IV. Detailed Tasks and/or Expected Outputs**

The roadmap developer will work with the ABS Project Management Unit, particularly in close collaboration with the Enterprise Development Specialist and Stakeholders Engagement and Gender Specialist. The detailed tasks include but are not limited to the following:

1. Provide an overview of the industry through a comprehensive review and summary of available value chain analysis studies and roadmaps of Banaba (Indicator 11);
2. Conduct a rapid market assessment to determine the extent of the Philippine and global existing and potential markets of Banaba as raw materials including their by-products and derivatives (Output 3.2);
3. Organize and facilitate meetings/workshops/ FGDs/ KIIs/ field validation/ stakeholders' consultations with the relevant industry players and experts;

4. Identify key specific products that may have a comparative advantage and provide strategies to enhance their position in the global market (Indicator 11 and Output 3.1).
5. Conduct gender analysis to identify and analyze the following: (a) the specific role of women and men in the value chain process, (b) to what extent in terms of access and control of women as well as men in the access and use of productive resources, (c) gender and social norms along the value chain in relation to its impact and benefit of women and women empowerment, (d) gender gap in the value chain, and (e) how men and women are impacted by their social and gender roles, reproductive role, and opportunities for women in participation and decision-making process in the value chain (Indicator 11).
6. Develop gender-smart value chain maps and determine the key players and their functions in the value chain of Banaba and their products (Indicator 11);
7. Incorporate ABS processes such as F/PIC and Mutually Agreed Terms (MAT) in the value chains and road maps (Indicator 11);
8. Formulate strategic initiatives/objectives and identify key result areas. Strategic initiatives shall consist of the following: (a) Vision, mission, and objectives, (b) Strategic priorities, and (c) Effective evaluation mechanism (Output 3.2);
9. Develop action plan/s consisting of specific areas to focus on, stakeholders involved, timeline, and estimated budget (Output 3.2); and
10. Present draft strategic roadmap report to PMU, national and site-level TWG and other stakeholders such as research and academic institutions, IPLCs and private sector representatives, revise accordingly based on their recommendations, and finalize the report for approval (Output 3.2) and make recommendations on how this roadmap may contribute to the National ABS Roadmap (Output 1.4).

#### V. Deliverables

1. Inception Report covering the overall approach, methodology, outline of the report, work plan, and detailed budget for the conduct of value chain analysis and strategic road mapping activities.
2. Rapid Market Appraisal (RMA) Report which covers information related to supply (production volume, areas, etc.), demand (product forms, market destination, etc.), prices (product prices, price differentiation, etc.), and relevant policy environment (grades and standards, regulations, etc.) and issues governing the operation of a given industry.
3. Quarterly progress reports which include a section on Stakeholder Consultation Reports.
4. Draft reports on the strategic roadmap for the identification and creation of benefits based on genetic resource development of Banaba which include but are not limited to the following:
  - a. Context Setting/ Situationer
  - b. Value Chain Analysis and Mapping
  - c. Markets and Market Opportunities
  - d. Data Analysis and Recommendations (SWOT analysis, trend analysis, and environmental scanning, etc.)
  - e. Roadmap vision and mission and target setting
  - f. Strategies and Policies (action programs and priority activities)
  - g. Plan Implementation and Monitoring
5. Final approved and packaged strategic roadmap report for Banaba.



## VI. Minimum Qualification Requirements

To ensure that the outputs are achieved, this engagement must be conducted by a qualified team of experts consisting of the following:

Team Members	Minimum Qualification Requirements
Team Leader	<ol style="list-style-type: none"><li>1. At least ten (10) years of professional experience in strategic planning and management, industry analysis, and roadmap formulation in the Philippine context</li><li>2. At least master's degree in development studies, business management, economics, policy studies, social science, or any related field</li><li>3. At least five (5) years of experience in facilitating participatory consultations with multi-stakeholders</li><li>4. At least five (5) years of experience in using qualitative and quantitative research methods, including the collection and analysis of primary data through interviews and focus groups</li></ol>
Gender Expert	<ol style="list-style-type: none"><li>1. Five (5) years of professional experience in gender analysis and mainstreaming in the fields of environment, biodiversity, and/or natural resources management. Specific experience about gender mainstreaming into nature-based value chains is an advantage</li><li>2. Bachelor's degree in social science, development studies, or any related field</li><li>3. At least five (5) years of experience in facilitating participatory consultations with multi-stakeholders</li><li>4. At least three (3) years of experience in using qualitative and quantitative research methods, including the collection and analysis of primary data through interviews and focus groups</li></ol>
Value Chain Expert	<ol style="list-style-type: none"><li>1. Five (5) years of professional experience in industry analysis, value chain analysis studies, and implementing value chain development projects</li><li>2. Bachelor's degree in economics, agribusiness management, entrepreneurship, development economics, or any related field</li><li>3. At least five (5) years of experience in facilitating participatory consultations with multi-stakeholders</li><li>4. At least three (3) years of experience in using qualitative and quantitative research methods, including the collection and analysis of primary data through interviews and focus groups</li></ol>

Moreover, the consulting **firm** to be engaged must have the following qualifications:

1. At least five years of experience in conducting consulting projects
2. Conducted at least one consulting project on road mapping
3. Team members preferably must have previous experience in road mapping consultancy projects
4. At least one team member with demonstrated understanding of the International Treaty on Plant Genetic Resources for Food and Agriculture (ITPGRFA) and the Nagoya Protocol on Access to Genetic Resources and the Fair and Equitable Sharing of Benefits (NP-ABS)



## VII. Timetable

The Consulting firm is expected to deliver the outputs within 7 months after acceptance of Notice to Proceed (NTP) and contract.

## VIII. Contract Price and Schedule of Payment

The total approved budget for this engagement is PhP 4,000,000.00 inclusive of professional fees, data gathering and workshop expenses, taxes and charges, travel and accommodation expenses, communication expenses, and other costs that may be incurred in the process. Processing of payment will be done through DENR-BMB and direct payment will be made by UNDP Philippines.

The payment to the consulting firm is through tranches after the submission and acceptance of deliverables, to wit:

<b>Deliverables</b>	<b>Percentage of Total Contract Cost</b>	<b>Breakdown of Budget (PhP)</b>	<b>Target Date for Payment</b>
Inception Report	15%	600,000.00	After signing of contract, submission, and acceptance of Inception Report (with Work Plan)
Rapid Market Appraisal (RMA) Report  1 <sup>st</sup> Draft of strategic roadmap reports for Banaba	20%	800,000.00	Upon submission and acceptance of the following:  1. Rapid Market Appraisal (RMA) Report 2. 1 <sup>st</sup> Draft of strategic roadmap reports for Banaba
2 <sup>nd</sup> Draft of strategic roadmap reports for Banaba	20%	800,000.00	Upon submission and acceptance of the 2 <sup>nd</sup> Draft of strategic roadmap reports for Banaba
3 <sup>rd</sup> Draft of strategic roadmap reports for Banaba	15%	600,000.00	Upon submission and acceptance of the 3 <sup>rd</sup> Draft of strategic roadmap reports for Banaba
Final packaged strategic roadmap reports for Banaba	30%	1,200,000.00	Upon submission and acceptance of the final packaged strategic roadmap reports for Banaba
<b>Total</b>	<b>100%</b>	<b>4,000,000.00</b>	

## IX. Method of Evaluation

The proposals will be evaluated using Quality-Based Evaluation (QBE) based on RA 9184 and its IRR which will only consider the Technical Proposals in the ranking of consulting firms. The top three consulting firms will be short-listed.

## X. Management and Reporting Arrangements

The DENR Biodiversity Management Bureau shall contract the Consulting Firm, which shall be under the direct supervision of the ABS Project Management Unit, in close coordination with the BMB-Wildlife Resources Division.

Interested applicants should submit the following to the BAC Chairperson on or before

1. Letter of intent
2. Company/firm profile detailing experience and previously completed projects similar to the scope of work, detailed task, and deliverables of this project.
3. List of all previous and ongoing consultancy engagements/ projects of the firm indicating the contract cost and accomplishment status;
4. Curriculum Vitae of each team member which includes and highlights the following:
  - a. Educational background
  - b. Relevant work experiences to the role/assignment in the team
  - c. Experience in road map formulation, participatory consultations and using research methods (qualitative and quantitative)
5. Sample of completed works of the firm and each of the team member in electronic copy (or URL if published)

**THE CHAIRPERSON**

Bids and Awards Committee

Office of the Director

Biodiversity Management Bureau, DENR

Ninoy Aquino Parks and Wildlife,

North Ave. Diliman, Quezon City

(02) 8-925-8948, (02) 8-924-6031 loc. 207

Email: [bacsec@bmb.gov.ph](mailto:bacsec@bmb.gov.ph)

cc: [phl.abs.project@gmail.com](mailto:phl.abs.project@gmail.com)

Approved by:

  
**MARCIAL C. AMARO, JR.**

Director

In concurrent capacity as Assistant Secretary for Policy,  
Planning and Foreign-Assisted Special Projects

## **Section II. Eligibility Documents**



## 1. Eligibility Criteria

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

## 2. Eligibility Requirements

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

### Legal Documents

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

Technical Documents

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

- (b) Class "B" Document –

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

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



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

- 2.3. Prospective bidders may obtain a full range of expertise by associating with individual consultant(s) and/or other consultants or entities through a JV or subcontracting arrangements, as appropriate. However, subconsultants may only participate in the bid of one 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 initiated by the duly authorized representative/s of the prospective bidder.
- a. **4. Sealing and Marking of Eligibility Documents**
- 4.1. Prospective bidders shall enclose their original eligibility documents described in Clause 2.1, in a sealed envelope marked "ORIGINAL – ELIGIBILITY DOCUMENTS". Each copy thereof shall be similarly sealed duly marking the envelopes as "COPY NO. \_\_\_ - ELIGIBILITY DOCUMENTS". These envelopes containing the original and the copies shall then be enclosed in one single envelope.
  - 4.2. The original and the number of copies of the eligibility documents as indicated in the **EDS** shall be typed or written in ink and shall be signed by the prospective bidder or its duly authorized representative/s.
  - 4.3. All envelopes shall:
    - (c) contain the name of the contract to be bid in capital letters;



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

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

b. **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**.

c. **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.

d. **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.

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

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

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

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

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

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

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



**f. 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. Shortlisted 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	<i>Conduct of in-depth value chain analysis, road mapping and identifying commercialization potential of Banaba through conduct of stakeholder's consultations, validations</i>
1.3	<p>Foreign consultants may be eligible to participate in this Project, subject to the following conditions to be complied within ten (10) days upon receipt of the Notice of Award:</p> <p>a) must be registered with the SEC and/or any agency authorized by the laws of the Philippines;</p> <p>b) when the types and fields of consulting services in which the foreign consultant wishes to engage involve the practice of regulated professions, the foreign consultant must be authorized by the appropriate GoP professional regulatory body specified in Clause 1.2 to engage in the practice of those professions and allied professions: <i>Provided, however,</i> That the limits of such authority shall be strictly observed.</p>
2.1(a)(ii)	The statement of all ongoing and completed government and private contracts shall include all such contracts within <i>five (5) years</i> prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	<i>Performance Evaluation and Rating from clients Certificate of Acceptance</i>
4.1	Each prospective bidder shall submit one (1) original and two (2) copies of its eligibility documents.
(e)	<p><i>State the Bids and Awards Committee of the Procuring Entity concerned with the Project.</i></p> <p><i>Anson M. Tagtag - Chairperson</i>  <i>Meriden E. Maranan - Vice-Chairperson</i>  <i>Nancy R. Corpuz - Member</i>  <i>Atty. Theresa M. Tenazas - Member</i>  <i>Nermalie M. Lita - End-user</i></p>
4.1(f)	<p><i>State specific details concerning the identification of the Project</i></p> <p style="text-align: center;"><i>REI No. 2023-017</i></p>

4.3( c)	<p>The address for submission of eligibility documents is:</p> <p style="text-align: center;"><i>The Chairperson Bids and Awards Committee Biodiversity Management Bureau Ninoy Aquino Parks and Wildlife Center Quezon Avenue, Diliman, Quezon City Telephone No. 8924-6031 to 35 local 221 E-mail: bacsec@bmb.gov.ph</i></p> <p>The deadline for submission of eligibility documents is:</p> <p style="text-align: center;"><i>June 1, 2023, 1:00 P.M.</i></p>										
9.1	<p>Similar contracts shall refer</p> <p style="text-align: center;"><i>Road Mapping, Strategic Plans and Frameworks</i></p>										
9.3	<p><i>Insert here the detailed set of criteria and rating system to be used by the Procuring Entity for the shortlisting of consultants. The criteria shall consider the applicable individual experiences of the principal and key staff in case of new firms.</i></p> <table border="1" data-bbox="508 1016 1396 1378" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: center;"><i>CRITERIA</i></th> <th style="text-align: center;"><i>WEIGHT</i></th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><i>1. Track Record of Consulting Firm</i></td> <td style="text-align: center;"><i>70</i></td> </tr> <tr> <td style="text-align: center;"><i>2. Qualification of Team Composition</i></td> <td style="text-align: center;"><i>30</i></td> </tr> <tr> <td style="text-align: center;"><i>TOTAL</i></td> <td style="text-align: center;"><i>100</i></td> </tr> <tr> <td style="text-align: center;"><i>PASSING RATE</i></td> <td style="text-align: center;"><i>70</i></td> </tr> </tbody> </table>	<i>CRITERIA</i>	<i>WEIGHT</i>	<i>1. Track Record of Consulting Firm</i>	<i>70</i>	<i>2. Qualification of Team Composition</i>	<i>30</i>	<i>TOTAL</i>	<i>100</i>	<i>PASSING RATE</i>	<i>70</i>
<i>CRITERIA</i>	<i>WEIGHT</i>										
<i>1. Track Record of Consulting Firm</i>	<i>70</i>										
<i>2. Qualification of Team Composition</i>	<i>30</i>										
<i>TOTAL</i>	<i>100</i>										
<i>PASSING RATE</i>	<i>70</i>										



**PROCUREMENT FOR THE SERVICES OF CONSULTING FIRM  
TO DEVELOP THE STRATEGIC ROADMAP FOR BANABA**

**CHECKLIST OF REQUIRED DOCUMENTS**

**LEGAL DOCUMENTS**

Class "A" Documents

1. PHILGEPS Certificate of Registration (Platinum)

**TECHNICAL DOCUMENTS**

2. Statement of 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:
  - 2.1 the name and location of the contract;
  - 2.2 date of award of the contract;
  - 2.3 type and description of consulting services;
  - 2.4 consultant's role (whether main consultant, sub consultant, or partner in a JV)
  - 2.5 amount of contract
  - 2.6 contract duration; and
  - 2.7 certificate of satisfactory completion or equivalent document specified in the EDS issued by the client, in the case of a completed contracts
3. 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.

Class "B" Document

If applicable

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

**PROCUREMENT FOR THE SERVICES OF CONSULTING FIRM  
TO DEVELOP THE STRATEGIC ROADMAP FOR BANABA**

**STATEMENT OF COMPLETED CONTRACTS**

This is to certify that \_\_\_\_\_ has the following completed contracts for the period CY \_\_\_\_\_

Name and Location of the Contract	Date of Award of the Contract	Type and Brief Description of Consulting Services	Consultant's Role (Main Consultant, Sub-Contractor Partner in a JV, etc.	Amount of Contract	Contract Duration	Proof/ Certificate of Satisfactory Completion or Equivalent Document Issued by at Least One (1) Client (Separate Sheet)
			Note: Include description of the activities conducted/ undertaken by the consultant		Note: Include month/s and years/s for studies and day/s and hour/s for trainings /workshops/seminars	

\_\_\_\_\_  
Name and Signature of Authorized Representative

\_\_\_\_\_  
Date

**Instructions:**

- a) Cut-off date : The day before the deadline of submission of eligibility documents.
- b) State completed contracts for the last five (5) years contracts that are similar to the project being procured/bid in terms of nature and amount shall be prioritized in inclusion in the list

**PROCUREMENT FOR THE SERVICES OF CONSULTING FIRM  
TO DEVELOP THE STRATEGIC ROADMAP FOR BANABA**

**STATEMENT OF ONGOING AND AWARDED BUT NOT YET STARTED  
CONTRACTS**

This is to certify that \_\_\_\_\_ has the following ongoing and awarded but not yet started contracts:

Name and Location of the Contract	Date of Award of the Contract	Type and Brief Description of Consulting Services	Consultant's Role (Main Consultant, Sub-Contractor Partner in a JV, etc.)	Amount of Contract	Contract Duration	Remarks
			Note: Include description of the activities to be conducted/undertaken by the consultant		Note: Include month/s and years/s for studies and day/s and hour/s for trainings / workshops/ seminars	

\_\_\_\_\_  
Name and Signature of Authorized Representative

\_\_\_\_\_  
Date

**Instructions:**

- a) State all ongoing contracts including those awarded but not yet started (government and private contracts which may be similar or not similar to the project called for procurement/bidding) as of the day before the deadline of submission of eligibility documents.



- b) If there is no ongoing contract including awarded but not yet started as of the aforementioned period, state none or equivalent term.

### FORMAT OF CURRICULUM VITAE (CV)

---

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

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

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

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

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

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

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

\_\_\_\_\_

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

\_\_\_\_\_

#### **Key Qualifications:**

*[Give an outline of staff member's experience and training most pertinent to tasks on project (in months and years with detailed description/discussion on the nature and scope of work). Describe the degree of responsibility held by staff members on relevant previous projects and give dates and locations.]*

\_\_\_\_\_

#### **Education:**

*[Summarize college/university and other specialized education of staff members, giving names of schools, dates attended, and degrees obtained.]*

\_\_\_\_\_

#### **Employment Record:**

*[Starting with the present position, list in reverse order every employment held. List all positions held by staff members since graduation, giving dates, names of employing organizations, titles of positions held, and locations of projects. For experience in the last 20 years 9in-man-months for evaluation studies and man-hours/man-days for training/seminars/workshops conducted/provided), also indicate role played and types of activities performed and client references, where appropriate. Failure to indicate details of role and duration shall merit zero points.]*

\_\_\_\_\_



**PROCUREMENT FOR THE SERVICES OF A CONSULTING FIRM TO DEVELOP  
THE STRATEGIC ROADMAP FOR BANABA**

**STATEMENT OF KEY STAFF FOR CONSULTING SERVICES**

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

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

Field of Expertise/Name of Personnel	Name of Related Study Involved	Position/Involvement in the Related Study	Nationality	Years with the Firm	Number of Study Currently Involved
1. Team Leader					
l					
to					
n					
2. Gender Expert					
l					
to					
n					
3. Value Chain Expert					
l					
to					
n					

It is hereby confirmed that the above consultants are registered professionals authorized by the appropriate regulatory body to practice their profession.

Note:

- Should the personnel mentioned above be "on-call" or not a permanent employee of the consulting firm, please provide evidence and said personnel agreed to be nominated and once the firm is shortlisted, the personnel will submit a letter of commitment.

Submitted by: \_\_\_\_\_

Name of Representative of Bidders: \_\_\_\_\_

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

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