



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 OF 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)**

REI-SSS-CONSULTING-2021-002

Government of the Republic of the Philippines

A handwritten signature in black ink, appearing to read 'Amado'.

AMADO GREGORIO P. SOPECO
Chairperson, TWG

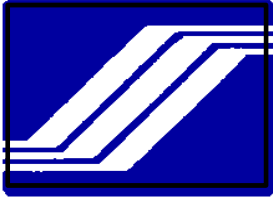
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Section I. Request for Expression of Interest



REPUBLIC OF THE PHILIPPINES
SOCIAL SECURITY SYSTEM

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Request for Expression of Interest REI-SSS-Consulting-2021-002

HIRING OF CONSULTANT TO CONDUCT OF 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)

1. The *Social Security System (SSS)*, through the Approved 2021 Indicative Annual Procurement Plan (IAPP) Updates with Code PAP (1 & 2) of the 2021 IAPP under MOOE, intends to apply the sum of **Php 8,350,000.00**, being the Approved Budget for the Contract (ABC) to payments under the contract for **Hiring of Consultant to Conduct of 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)**

A bidder shall be allowed to submit its bid for 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	East Triangle, EDSA cor. East Ave., Quezon City	Php4,150,000.00
2	Financial Center Area (FCA) 5-ha., Pasay City	4,200,000.00
	TOTAL	Php8,350,000.00

2. The *Social Security System* now calls for the submission of expression of interest (EOI) with eligibility documents from potential bidders/consultants for **the conduct of the HABU study with Valuation of DUR and crafting of the TOR for the development of the SSS prime IPs.** Interested consultants must have **at least five (5) years of experience in advisory and consultancy services in real property development and must have at least one (1) completed HABU study and one (1) Valuation of DUR to qualify for eligibility.**

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. *Similar or related contracts may include but is not limited to business case study, feasibility study and business valuation on property development projects associated with government and/or private sector within the past ten (10) years.*

The scope of the HABU study with Valuation of DUR and the 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.

Eligibility documents of interested consultants must be duly received by the BAC Secretariat **on or before 16 November 2020 (Wednesday) not later than 10:00 a.m. at the 2nd Floor, SSS Main Building, East Avenue, Diliman, Quezon City.** Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion.

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 13 November 2020, 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 the last item of the Instructions to Bidders (ITB) from Monday to Friday, 8:00a.m. to 5:00p.m.
4. **A complete set of Bidding Documents may be acquired by interested bidders starting 07 November 2020 up to the scheduled submission & opening of eligibility documents** from the address stated in the last item of the ITB.

Payment for the Bidding Documents shall be paid by the Shortlisted Consultant’s only, as follows:

<i>Lot</i>	<i>Price of Bid Documents (non-refundable)</i>
1	P 4,100.00
2	P 4,200.00

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

CRITERIA	MINIMUM REQUIREMENT	MAX. PTS
A. Applicable Experience of the Consulting Firm	One (1) HABU study and one (1) Valuation of DUR completed for the last ten (10) years prior to the submission of eligibility documents.	40
B. Length of Existence of Consulting firm	Must be duly registered and authorized by the appropriate agencies to perform real estate consultancy services for at least five (5) years prior to the submission of eligibility documents.	20
C. Qualification of Senior Officer and Key Personnel of the Consultant	Sr. Officer and 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.	30

CRITERIA	MINIMUM REQUIREMENT	MAX. PTS
D. Current Workload Relative to Capacity	N/A	10
TOTAL		100
PASSING SCORE		80 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.
- (i) 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). The weights to be allocated for the Technical and Financial Proposals are indicated in Clause 25.3, 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 the same Clause 25.3, Section III, Bid Data Sheet, Part II of the Bidding Documents.
8. Subject to the periods to fulfill No. 4, each of the contracts shall be completed within **one hundred (100) 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 DUR valuation and TOR for the recommended development/investment option for each property, for review and acceptance by the Head, Lending & Asset Management Group (LAMG) - One (1) set for each property	Within 60 calendar days upon receipt of NTP for the two (2) IPs
	Revised HABU study with DUR Valuation and TOR for review and acceptance by the Head, LAMG	Within 15 calendar days from receipt of the Notice to Revise in any of the two (2) IPs
2	Presentation of the Final HABU study with DUR valuation and TOR to the Risk Management and Investment Committee (RMIC) for its approval	Within 15 calendar days from the initial presentation with the RMIC, submission of the final HABU study with DUR valuation and final TOR, incorporated therein the comment, if any, of the RMIC, as certified by the Head, LAMG.
3	Presentation of the Final HABU study with DUR valuation and TOR to the SSC for its approval - Three (3) sets hard copy of the final HABU study with DUR valuation and TOR for each property - Soft copy (USB storage device) of the written report	Within 10 calendar days from presentation with the SSC, submission of revised final HABU study with DUR valuation and TOR, incorporated therein the comment, if any, of the SSC. Receipt of the IPD of the SSC Resolution approving the HABU study with DUR valuation and the final TOR or upon receipt of the final and correctly revised documents if the SSC approval was made subject to incorporations of final comments/instructions.

No.	DELIVERABLES	DELIVERY PERIOD
4	Provide assistance to SSS in the conduct of the selection/bidding process for the approved development/investment option for the SSS prime IPs in the following manner: <ul style="list-style-type: none"> a) Represent SSS in the presentation of the project during the pre-bid conference; b) Answer to queries of prospective bidders; c) Attend to SSS meetings if there are issues about the project that need to be clarified; and d) Assist in the evaluation and ranking of bids. 	Not included in the 100 calendar days term of engagement. The period for the required assistance shall commence from but not to exceed eight (8) months from the issuance of the SSC Resolution approving the HABU study/DUR valuation and TOR or upon receipt of the final and correctly revised documents if the SSC approval was made subject to incorporations of final comments / instructions up to award of the development project to the winning bidder.

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 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.
11. For further information, please refer to:

Bids and Awards Committee
The Secretariat
 2nd Floor, SSS Main Building
 East Avenue, Diliman, Quezon City
 Tel # 8922-1070, 8920-6401 local 5492 or 6382
 Email – bac@sss.gov.ph


THE CHAIRPERSON
BIDS & AWARDS COMMITTEE

ref: rei-consulting-sss-2021-002-Hiring of Consultant to Conduct of the HABU



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. 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 Documents																
1.2	<p>Consulting Services for the conduct of highest and best use (HABU) study with valuation of Development and Usufructuary Rights (DUR) and crafting of 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 style="text-align: center;">Lot 1 - East Triangle property Lot 2 – FCA 5 property</p> <p>The winning bidder must also provide assistance to SSS in the implementation of the approved development/investment option for SSS prime properties.</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> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width: 20%; background-color: #d3d3d3;">Key Personnel</th> <th style="width: 30%; background-color: #fff2cc;">Relevant Educational Attainment</th> <th style="width: 50%; background-color: #d9ead3;">Functions</th> </tr> </thead> <tbody> <tr> <td>Senior Officer</td> <td rowspan="4"> For Officers: <ul style="list-style-type: none"> • Management • Accountancy • Business and Finance • Law • Economics • Marketing • Math • Statistics • Engineering • Architecture </td> <td> <ul style="list-style-type: none"> • Act as the team leader / manager of the project; • Serve as the point person of the Consulting Firm; • Shall be the one to present to the SSS / SSC concerned units the result of the firm's study and recommended investment / development options </td> </tr> <tr> <td>Financial Analyst or equivalent position</td> <td> <ul style="list-style-type: none"> • Be 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 </td> </tr> <tr> <td>Technical Analyst or equivalent position</td> <td> <ul style="list-style-type: none"> • Be 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 </td> </tr> <tr> <td>Researcher or equivalent position</td> <td> For Researcher: Graduate of any 4-year course </td> <td> <ul style="list-style-type: none"> • Be responsible to collect, collate and coordinate the data obtained necessary for the completion of the project </td> </tr> </tbody> </table> <p style="text-align: center; margin-top: 10px;"> <ul style="list-style-type: none"> • Key Personnel shall perform other necessary and/or incidental functions for the completion of the project </p>			Key Personnel	Relevant Educational Attainment	Functions	Senior Officer	For Officers: <ul style="list-style-type: none"> • Management • Accountancy • Business and Finance • Law • Economics • Marketing • Math • Statistics • Engineering • Architecture 	<ul style="list-style-type: none"> • Act as the team leader / manager of the project; • Serve as the point person of the Consulting Firm; • Shall be the one to present to the SSS / SSC concerned units the result of the firm's study and recommended investment / development options 	Financial Analyst or equivalent position	<ul style="list-style-type: none"> • Be 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 	Technical Analyst or equivalent position	<ul style="list-style-type: none"> • Be 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 	Researcher or equivalent position	For Researcher: Graduate of any 4-year course	<ul style="list-style-type: none"> • Be responsible to collect, collate and coordinate the data obtained necessary for the completion of the project
Key Personnel	Relevant Educational Attainment	Functions														
Senior Officer	For Officers: <ul style="list-style-type: none"> • Management • Accountancy • Business and Finance • Law • Economics • Marketing • Math • Statistics • Engineering • Architecture 	<ul style="list-style-type: none"> • Act as the team leader / manager of the project; • Serve as the point person of the Consulting Firm; • Shall be the one to present to the SSS / SSC concerned units the result of the firm's study and recommended investment / development options 														
Financial Analyst or equivalent position		<ul style="list-style-type: none"> • Be 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 														
Technical Analyst or equivalent position		<ul style="list-style-type: none"> • Be 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 														
Researcher or equivalent position		For Researcher: Graduate of any 4-year course	<ul style="list-style-type: none"> • Be responsible to collect, collate and coordinate the data obtained necessary for the completion of the project 													

1.3	No further instructions
2	<p>Eligibility Requirements:</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 involving HABU study with valuation of DUR and other similar/related studies, including contracts awarded but not yet started, if any, within the period of ten (10) years. The statement shall include, for each contract, the following:</p> <ul style="list-style-type: none"> (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, sub-consultant, or partner in a JV) (ii.5) amount of contract; (ii.6) project construction cost; (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; <p>(iii) Statement of the consultant specifying its nationality and confirming that those who will actually perform the service are qualified professionals in accordance with Clause 1.2.</p> <p>The consultant must also submit the respective curriculum vitae of the key personnel indicating their respective positions in the performance of the project.</p> <p>Eligibility Document Submission Form (form Supplied)</p>
2.1(a)(ii)	The statement of all ongoing and completed government and private contracts 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.7)	Certificate of Completion issued by the client certifying acceptance of the project and explicitly stating therein at least a satisfactory performance by the consultant, including pertinent details of the project i.e. project title, project description/type, location of the project, etc.
4.2	Each Bidder shall submit five (5) sets. 1. One (1) Envelope marked ORIGINAL; and 2. Four (4) Envelopes marked COPY NO. ____ .
4.3(c)	The Social Security System's Bids and Awards Committee shall be concerned with the Project.
4.3 (d)	Consultancy Services for the Conduct of 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): a. East Triangle property b. FCA 5-has. property
5	The address for submission of eligibility documents is: BIDS AND AWARDS COMMITTEE <i>2nd Floor, SSS Main Building</i> <i>East Avenue, Diliman, Quezon City</i> The deadline for submission of eligibility documents is indicated in the Advertisement.
8.1	The place of opening of eligibility documents is at: BIDS AND AWARDS COMMITTEE <i>2nd Floor, SSS Main Building</i> <i>East Avenue, Diliman, Quezon City</i> The date and time of opening of eligibility documents is indicated in the Advertisement.
9.1	To qualify for eligibility, consultancy firm shall have completed at least one (1) HABU study and one (1) valuation of DUR at any Central Business District (CBD) nationwide on real property development within the past ten (10) years prior to the submission of eligibility documents. Similar or related contracts may include but is not limited to business case study, feasibility study and business valuation on property development projects associated with government and/or private sector within the past ten (10) years.



9.2	The following criteria and rating system shall be used for the short listing of consultants:	
	Criteria	Points
1	Applicable Experience of the Consulting Firm	40
2	Length of Existence of the Consulting Firm	20
3	Qualification of Senior Officer and Key Personnel	30
4	Current Workload Relative to Capacity	10
	Total Points	100
	The minimum score required to pass is <u>80</u> points.	



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

NAME OF CONTRACT	DATE OF AWARD OF THE CONTRACT	CONTRACT DURATION	AMOUNT OF CONTRACT	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES (Building Type, No. of Storey, Project Construction Cost, Brief Description)	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CONTACT PERSON AND CONTACT NUMBER

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

NAME OF CONTRACT	DATE OF AWARD OF THE CONTRACT	CONTRACT DURATION	AMOUNT OF CONTRACT	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES (Building Type, No. of Storey, Project Construction Cost, Brief Description)	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CONTACT PERSON AND CONTACT NUMBER

STATEMENT OF SIMILAR GOVERNMENT AND PRIVATE CONTRACTS FOR CONSULTANCY

NAME OF CONTRACT	DATE OF AWARD OF THE CONTRACT	CONTRACT DURATION	AMOUNT OF CONTRACT	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES (Building Type, No. of Storey, Project Construction Cost, Brief Description)	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CONTACT PERSON AND CONTACT NUMBER

Please attach supporting documents, i.e. contracts, Notice of Award/Notice to Proceed, JO, etc., list of on-going/current projects/contracts and complete list of regular employees.

