



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

# **PHILIPPINE BIDDING DOCUMENTS**

**Fifth Edition**  
**October 2019**

## **PART I**

# **Procurement of CONSULTING SERVICES**

**2020 Nationwide Detailed Survey for SSS**

*REI-SSS-Consulting 2020-001*

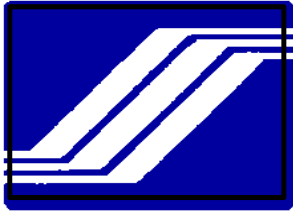
**Government of the Republic of the Philippines**

**COLETTE H. CORDIAL**  
Chairperson, TWG

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## PART I

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**SOCIAL SECURITY SYSTEM**

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***Request for Expression of Interest  
REI-SSS-Consulting 2020-001***

***CONDUCT OF THE 2020 NATIONWIDE DETAILED SURVEY FOR SSS***

1. The *Social Security System (SSS)*, through the Approved 2020 Corporate Operating Budget - MOOE with Code (PAP) 174 of the 2020 Annual Procurement Plan, intends to apply the sum of **P 24,500,000.00**, being the Approved Budget for the Contract (ABC) to payments under the contract for the **Conduct of the 2020 Nationwide Detailed Survey for SSS**. Bids received in excess of the 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 ***Procurement of Consulting Services for the Conduct of the 2020 Nationwide Detailed Survey for SSS to determine the correct universe for social security coverage, to include foreigners working in the Philippines and the Philippine Offshore Gaming Operators as employer-members, and to identify the untapped workforce (e.g., the employed and self-employed) for social security coverage.***

Eligibility documents of interested consultants must be duly received by the BAC Secretariat on or before \_\_\_\_\_ at the **Bidding Room (formerly CDRPD Computer Room), 2<sup>nd</sup> Floor, SSS Main Building, East Avenue, Diliman, Quezon City**. Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion.

3. Interested bidders may obtain further information from the *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 5:00p.m.
4. A complete set of Bidding Documents may be acquired by interested bidders starting \_\_\_\_\_ up to the scheduled submission & opening of eligibility documents from the address stated in the last item of the ITB and upon payment of the applicable fee for the Bidding Documents, in the amount of **₱13,500.00**.

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

It may also be **downloaded free of charge** from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the website of the SSS, provided that 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 Revised Implementing Rules and Regulations (RIRR).

The short list shall consist of **three (3)** prospective bidders who will be entitled to submit bids. The criteria and rating system for short listing are:

| <b>CRITERIA</b>  | <b>RATING</b>   |
|--|-----------------|
| A. <i>Applicable Experience</i><br>a. <i>Number of years in operation prior to the submission of Eligibility Requirement (minimum of 3 years)</i><br>b. <i>Number of similar projects completed in the last three (3) years prior to the submission of Eligibility Requirement (minimum of 3 completed similar projects/studies)</i> | 40 pts.         |
| B. <i>Qualification and competence of personnel to be assigned to the project</i>  | 25 pts.         |
| C. <i>Current (2019) workload vs. capacity to do the job</i>   | 35 pts.         |
| <b>TOTAL</b>   | <b>100 pts.</b> |
| <b>PASSING SCORE</b>   | <b>60 pts.</b>  |

\* Similar: Scope: Nationwide; survey on Social Demographic

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

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

7. The SSS shall evaluate bids using the *Quality-Cost Based Evaluation (QCBE)*. The SSS shall indicate the weights to be allocated for the Technical and Financial Proposals. 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 and a half (7½) months or earlier, details below:

| <b>Activities/General Tasks</b>  | <b>Timeline</b>             |
|--|-----------------------------|
| Mobilization and review of secondary data  | Two (2) weeks               |
| Refining and finalizing the details and methodology, data management framework, and project management plans   | 1-1.5 months                |
| Finalizing the operational, staffing and supervision for the detailed survey; designing the survey instrument, developing the work plan and components of the database platform, mobile and web-based application; and field users’ manual; plan for the development and pre-testing of the survey system; plan for data quality checks and review systems/processes; plan for the conduct of training of field teams; communication/coordination plan; cost management and procurement plan; risk analysis and plan for risk management; and plan for organizing office and coordination schemes to various SSS divisions |                             |
| Reviewing, finalizing and submitting the Inception Report  |                             |
| Mobilization and review of secondary data  |                             |
| Translating questionnaires into local dialects   | 0.5 month                   |
| Pre-testing and pilot-testing of survey instrument, operations plan and data entry system to test construct validity, efficiency of survey system; and test the validity and practicality of proposed operations and work plan   |                             |
| Developing and submitting the initial version of the web-based survey system for data capture and entry  |                             |
| Preparing and finalizing the survey manual with procedures and protocols for data entry and quality checks   | 0.5 to 1 month depending on |
| Preparing survey requirements: coordination of activities with SSS divisions and identified stakeholders and securing of necessary permits;  |                             |

|  |  |
|--|--|
| preparing logistics-travel and accident insurances, transport and accommodation needs, training needs and kits   | sample size                                  |
| Organizing pre-selected supervisors; and hiring and employing the field teams composed of field supervisors and enumerators, of which number will depend on the approved sample size   |  |
| Conducting a week-long training (depending on the length of the questionnaire) with a day of field practicum   |  |
| Conducting face-to-face interview; and securing and reviewing require secondary data   | 1 to 1.5 months depending on the sample size |
| Monitoring survey activities, performing coaching activities, documenting progress, issues and lessons learned, assessing teams' performance, resolving issues; modifying protocols, procedures and communication as necessary; addressing conflict and other problems; improving team interaction to ensure efficient data collection |  |
| Performing data entry, review, verification and quality checks thru the web-based system   |  |
| Data management, processing, consolidation, and analysis   | 2 to 3 months depending on the sample size   |
| Report writing and submission of draft   |  |
| Revision and packaging final report and exit conference  |  |

9. References to the dates and times shall be based on Philippine Standard time. Should any of the above dates fall on a holiday, the deadline shall be extended to the same time on the immediately succeeding business day in Quezon City.
10. The Social Security System reserves the right to reject any and all bids, declare a failure of bidding, or not award the contract at any time prior to contract award in accordance with Section 41 of RA 9184 and its IRR, without thereby incurring any liability to the affected bidder or bidders.
11. The Social Security System assumes no obligation to compensate or indemnify parties for any expense or loss that they may incur as a result of their participation in the procurement process, nor does SSS guarantees that an award will be made as a result of this invitation. Furthermore, the SSS reserves the right to waive any defects or formality in the responses to the eligibility requirements and to this invitation and reserves the right to accept the proposal most advantageous to the agency.
12. For further information, please refer to:

**Bids and Awards Committee**

**The Secretariat**

2<sup>nd</sup> Floor, SSS Main Building

East Avenue, Diliman, Quezon City

Tel # (632) 8922-1070, 8920-6401 local 5492/6382

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

**THE CHAIRPERSON  
BIDS & AWARDS COMMITTEE**

ref.: rei-sss-consulting-2020-00\_ - Nationwide Detailed Survey for SSS

# *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, sub consultant, or partner in a JV)
  - (ii.5) amount of contract;
  - (ii.6) contract duration; and
  - (ii.7) certificate of satisfactory completion or equivalent document specified in the **EDS** issued by the client, in the case of a completed contract;
- (iii) Statement of the consultant specifying its nationality and confirming that those who will actually perform the service are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions in accordance with Clause 1.2, including their respective curriculum vitae.

(b) Class "B" Document –

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

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

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

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

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

The English translation shall govern, for purposes of interpretation of the bid.

- 2.3. Prospective bidders may obtain a full range of expertise by associating with individual consultant(s) and/or other consultants or entities through a JV or subcontracting arrangements, as appropriate. However, sub consultants 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 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 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*

|                              |  |
|------------------------------|--|
| <b>Eligibility Documents</b> |  |
| 1.2                          | <i>Management and Related Services for the Conduct of the 2020 Nationwide Detailed Survey for SSS</i>  |
| 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> <p style="padding-left: 40px;">(ii.1) the name and location of the contract;</p> <p style="padding-left: 40px;">(ii.2) date of award of the contract;</p> <p style="padding-left: 40px;">(ii.3) type and brief description of consulting services;</p> <p style="padding-left: 40px;">(ii.4) consultant's role (whether main consultant, sub consultant, or partner in a JV)</p> <p style="padding-left: 40px;">(ii.5) amount of contract;</p> <p style="padding-left: 40px;">(ii.6) contract duration; and</p> <p style="padding-left: 40px;">(ii.7) certificate of satisfactory completion or equivalent document specified in the <b>EDS</b> issued by the client, in the case of a completed contract;</p> <p>(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.</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 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>“Certificate of Completion” for completed contracts from previous clients with contact person’s name and phone numbers.</i>  |
| 4.2          | <p>Each Bidder shall submit five (5) sets.</p> <p>1. One (1) Envelope marked ORIGINAL; and<br/> 2. Four (4) Envelopes marked COPY NO. ____.</p>   |
| 4.3 (c)      | The Social Security System Bids and Awards Committee shall be concerned with the Project.   |
| 4.3 (d)      | <p><i>The winning Consultant shall conduct the 2020 Detailed Nationwide Survey for SSS in determining the correct universe for social security coverage and identifying the untapped workforce (e.g., the employed, self-employed and foreigners working in the Philippines and the Philippine Offshore Gaming Operators as employer-members) for social security coverage. The detailed nationwide survey that will determine the correct universe for social security coverage per industry demographic.</i></p> <p><i>The sample size shall be 4,000 respondents with a margin of error of <math>\pm 0.015</math> per Fisher and Kish formula<sup>1</sup> and with no assumption on the universe. Nationwide in scope, could be clustered by municipality (Population size) and type e.g., 200 municipalities to be covered nationwide at 20 respondents per municipality. Includes “last mile” or isolated communities with little access to government service.</i></p> <p><i>The Consultant will undertake the Survey Design, Preparation and Reproduction of Questionnaires; Translation of Questionnaire to dialects (if necessary); Briefing and Training of Field Interviewers; Actual Field Interviews; Field Quality Control; Data Processing, Validation and Generation of Data Tables; Report Writing and Analysis; and Oral Presentation of Survey Findings</i></p> <p><b>A. SCOPE:</b></p> <p>Nationwide in scope, the detailed survey and assessment will involve the design, preparation, coordination, implementation and presentation of the detailed Survey using quantitative and qualitative information gathered through Survey, Key Informant Interviews (KII) and/or Focus Group Discussions.</p> <p>For the Survey and/or Key Informant Interview (KII), the target number of respondents is 4,000 with a margin of error of + 0.015 per Fisher and Kish formula and with no assumption on the universe. Includes “last mile” or isolated communities with little access to government service. Each set of respondents shall fall within the Household population 15-years old and above of the labor force, and to include foreigners working in the Philippines and the Philippine Off-shore Gaming Operators, as member-employers.</p> <p>Simultaneous with the survey or KII or within the period allocated for the conduct of survey or KII, the consultant/evaluation team should conduct a Focus Group Discussion (FGD). The consultant/evaluation team will arrange for the venue, coordinate the common time for a significant number of respondents and facilitate the FGD.</p> |

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<sup>1</sup> Where the population is unknown, the sample size can be derived by computing the minimum sample size required for accuracy in estimating proportions by considering the standard normal deviation set at 95% confidence level (1.96), percentage picking a choice or response (50% = 0.5) and the confidence level interval (0.05 =  $\pm 5$ ).

**B. OBJECTIVE**

- a. Determine the correct universe for social security coverage with emphasis on the untapped population including foreigners working in the Philippines and the Philippine Off-shore Gaming Operators, as member-employers; and
- b. Gather socio-demographic data and level of vulnerability of the untapped population.

**C. RATIONALE**

- a. The project is geared towards the realization of the institution's vision of a universal and equitable social protection. The vision is anchored on its mandate, of operating a mechanism that would provide protection to its members in times of contingencies such as old age, disability, death, sickness and maternity.
- b. The Philippine Development Plan (PDP) 2017-2022 sets clear targets for coverage expansion. The specific strategies under this goal include the enhancing of social protection for the informal sector, improving the social security system, establishing an unemployment insurance system, among others.
- c. However, social security remains out of reach for most of the population, except those at the top of 20-30 percent of the income distribution.<sup>2</sup> This is because the established social security mechanism/instruments have been constrained by the structure of the economy where low productivity and intermittent jobs are in the informal sector.
- d. The Social Security Commission (SSC) is cognizant of the institution's and country's vision of a universal and equitable social protection.

**D. OUTPUT/OUTCOME**

- a. Correct universe for social security coverage
- b. Key Indicator Reports includes database of
  - SSS members and Non-members
  - Demographic profile of untapped workforce both in the formal and informal sectors including foreigners working in the Philippines and the Philippine Off-shore Gaming Operators, as member-employers by:
    - Area (City/Municipal, Province, Region arranged according to SSS clustering)
    - Gender
    - Socio-Economic Class
    - Income from Employment
    - Other sources of income
    - Class of Worker
    - Number and distribution by Gender, by Area, by Major Industry Group
    - Number and distribution by Gender, by Area, by Major Occupation
  - Effect on SSS Financial Viability, OPEX, Benefits Program, etc.

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<sup>2</sup> WorldBank Report 2016

|     |   |
|-----|---|
|     | <ul style="list-style-type: none"> <li>▪ Estimated potential contribution collection from untapped workforce by: <ul style="list-style-type: none"> <li>➤ Gender</li> <li>➤ Age</li> <li>➤ Socio-economic class</li> <li>➤ Income from employment</li> <li>➤ Other sources of income, if applicable</li> <li>➤ Educational attainment</li> <li>➤ Employment type (Regular employed, self-employed, etc.)</li> <li>➤ Class of worker</li> <li>➤ Occupation</li> <li>➤ Major Industry Group</li> <li>➤ Area</li> </ul> </li> <li>c. Analysis Report of the Main Findings from cross-tabulation and triangulation of gathered data.</li> <li>d. Field Assessment. This refers to a brief report on the experiences of the Team that will discuss SSS program related anecdotes and observations, suggestion for improvement, assessment of data quality, and incomplete and missing data.</li> </ul> |
| 5   | <p>The address for submission of eligibility documents is at:</p> <p><b>BIDS AND AWARDS COMMITTEE</b><br/> <i>Bidding Room (formerly CDPRD Computer Room),<br/> 2nd Floor, SSS Main Building<br/> East Avenue, Diliman, Quezon City</i></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><br/> <i>Bidding Room (formerly CDPRD Computer Room),<br/> 2nd Floor, SSS Main Building<br/> 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 | “No further instructions”   |
| 9.2 | <p>a. <i>Applicable Experience. Firm’s number of years of operation prior to the conduct of bidding, work experience on Social Survey and related studies of at least 5 similar* projects completed within the last ten years with amounts of not less than Php20,000,000.00 (for at least one similar project within the last three (3) years prior to the conduct of bidding)</i> <span style="float: right;"><b>- 40 pts</b></span></p> <p>b. <i>Qualifications and competence of personnel to be assigned to the project</i> <span style="float: right;"><b>- 25 pts</b></span></p> <p>c. <i>Current (2019) workload vs. capacity to do the job</i> <span style="float: right;"><b>- 35 pts</b></span></p> <p style="text-align: right;"><b>Total</b> <span style="border-top: 1px solid black; padding-top: 2px;"><b>100 pts.</b></span></p> <p><b>Passing rate is 60 pts.</b></p>           |

## 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 ON-GOING GOVERNMENT AND PRIVATE CONTRACTS**

| NAME OF CONTRACT | DATE OF AWARD OF THE CONTRACT | CONTRACT DURATION | AMOUNT OF CONTRACT | TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES<br>(Include duration of field survey, sample size covered, survey areas covered, number of field workers deployed per survey area) | CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CONTACT PERSON AND CONTACT NUMBER | NUMBER AND ROLE/POSITION OF PERSONNEL ASSIGNED TO EACH PROJECT INCLUDING FIELD WORKERS (e.g., Team Leader, Project Manager, Supervisors, etc.) |
|------------------|-------------------------------|-------------------|--------------------|--|---|--|
|                  |                               |                   |                    |  |   |  |

**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<br>(Include duration of field survey, sample size covered, survey areas covered, number of field workers deployed per survey area) | CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CONTACT PERSON AND CONTACT NUMBER | NUMBER AND ROLE/POSITION OF PERSONNEL ASSIGNED TO EACH PROJECT INCLUDING FIELD WORKERS (e.g., Team Leader, Project Manager, Supervisors, etc.) |
|------------------|-------------------------------|-------------------|--------------------|--|---|--|
|                  |                               |                   |                    |  |   |  |

**STATEMENT OF SIMILAR GOVERNMENT AND PRIVATE CONTRACTS  
FOR CONSULTANCY 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<br>(Include duration of field survey, sample size covered, survey areas covered, number of field workers deployed per survey area) | CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CONTACT PERSON AND CONTACT NUMBER | NUMBER AND ROLE/POSITION OF PERSONNEL ASSIGNED TO EACH PROJECT INCLUDING FIELD WORKERS (e.g., Team Leader, Project Manager, Supervisors, etc.) |
|------------------|-------------------------------|-------------------|--------------------|--|---|--|
|                  |                               |                   |                    |  |   |  |

