

PHILIPPINE BIDDING DOCUMENTS



Procurement of CONSULTING SERVICES

**First Edition
May 2025**

Preface

These Philippine Bidding Documents (PBD) for the Government of the Philippines (GoP) for the procurement of Consulting Services through [*Competitive Bidding, Limited Source Bidding, Competitive Dialogue*,¹ or *Unsolicited Offer with Bid Matching*²] have been prepared by GoP for use by all branches, agencies, departments, bureaus, offices, or instrumentalities of the government, including government-owned and/or -controlled corporations (GOCC), government financial institutions (GFI), state universities and colleges (SUC), and local government units (LGU) and autonomous regional government³ use in projects that are financed in whole or in part by the GoP or any foreign government/foreign or international financing institution in accordance with the provisions of the Implementing Rules and Regulations (IRR) of Republic Act (RA) No. 12009.

The Bidding Documents shall clearly and adequately define, among others: (a) the objectives, scope, and expected outputs and/or results of the proposed contract; (b) the eligibility requirements of bidders, such as track record to be determined by the Head of the Procuring Entity (HoPE); (c) the expected contract duration, delivery schedule and/or time frame; and (d) the obligations, duties, and/or functions of the winning bidder.

In order to simplify the preparation of the Bidding Documents for each procurement, the PBD group the provisions that are intended to be used unchanged in Section II. Short-Listing Documents of Part I; and **Error! Reference source not found.** (ITB) and **Error! Reference source not found.** (GCC) of Part II. Data and provisions specific to each procurement and contract should be included in Section III. Short-listing Data Sheet (SDS) of Part I, **Error! Reference source not found.** (BDS), and **Error! Reference source not found.** (SCC) of Part II. The forms to be used are provided in Section VII. PBD Related Forms.

Prudence must be exercised to check the relevance of the provisions of the PBD against the requirements of the specific Consulting Services to be procured. In addition, each section is prepared with notes intended only as information for the Procuring Entity or the person drafting the Bidding Documents. They shall not be included in the final documents, except for the notes introducing Section VII. PBD Related Forms where the information is useful for the Bidder. The following general directions should be observed when using the documents:

- a) All the documents listed in the Table of Contents are normally required for the procurement of Consulting Services. However, they should be adapted as necessary to the circumstances of the particular Project.
- b) These PBD are divided into Part I and Part II, which shall be both made available from the time the Request for Expression of Interest is first published until the deadline for the submission and receipt of bids.
- c) Specific details, such as the “name of the Procuring Entity” and “address for bid submission,” should be furnished in the ITB, BDS, and SCC. The final documents should contain neither blank spaces nor options.

¹ For Second Stage of Competitive Dialogue under Section 29.4.2 of IRR of RA No. 12009.

² For Comparative or Competitive Bidding for Unsolicited Offer under Section 30.7 of IRR of RA No. 12009.

³ Unless the Treaty or International or Executive Agreement expressly provides use of foreign government/foreign or international financing institution procurement guidelines.

- d) This Preface and the footnotes or notes in italics included in the Request for Expression of Interest, SDS, BDS, SCC, Terms of Reference, and Appendices are not part of the text of the final document, although they contain instructions that the Procuring Entity should strictly follow. The Bidding Documents should not contain footnotes except Section VII. Philippine Bidding Document since these provide important guidance to Bidders.
- e) The criteria for evaluation and the various methods of evaluation in the ITB should be carefully reviewed. Only those that are selected to be used for the procurement in question should be retained and expanded, as required in the BDS. The criteria that are not applicable should be deleted from the BDS.
- f) The cover page should be modified as required to identify the Bidding Documents and date of issue.
- g) The Project Title page should be modified as required to identify the Project title and number, name, and address of the Procuring Entity.
- h) If modifications must be made in bidding procedures, they can be presented in the BDS. Modifications for specific Project or Contract details should be provided in the SCC as amendments to the Conditions of Contract. For easy reference and completion, clauses from the SDS, BDS, or SCC shall appear in bold type face on Section II. Short-listing Documents of Part I, Section II. Instructions to Bidders, and Section IV. General Conditions of Contract of Part II, respectively.



Procurement of CONSULTING SERVICES

**PROCUREMENT OF CONSULTANCY SERVICES
FOR CAMPAIGN DEVELOPMENT, MANAGEMENT,
AND IMPLEMENTATION OF THE INVESTOR
PROTECTION WEEK (IPW) 2025**

Competitive Bidding No. 2025-034

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Glossary of Acronyms, Terms, and Abbreviations

ABC – Approved Budget for the Contract.

BAC – Bids and Awards Committee.

BIR – Bureau of Internal Revenue.

BSP – Bangko Sentral ng Pilipinas.

CDA - Cooperative Development Authority.

DOLE – Department of Labor and Employment.

GCC - General Conditions of Contract.

GFI – Government Financial Institution.

GOCC – Government-Owned and/or –Controlled Corporation.

GoP – Government of the Philippines.

GPPB – Government Procurement Policy Board.

HoPE – Head of Procuring Entity.

HRRB – Highest Rated Responsive Bid.

IRR – Implementing Rules and Regulations of Republic Act No. 12009.

ITB – Instructions to Bidders.

LGUs – Local Government Units.

LoC – Letter of Credit.

MYCA – Multi-Year Contracting Authority.

NGA – National Government Agency.

PhilGEPS - Philippine Government Electronic Procurement System.

Procuring Entity - the organization purchasing Consulting Services, as named in the SCC.

RA No. – Republic Act Number.

SCC - Special Conditions of Contract.

SEC – Securities and Exchange Commission.

UN – United Nations.

WB – World Bank.

Definition of Terms

Bid – a signed offer, proposal, or quotation submitted by a supplier, manufacturer, distributor, contractor, consultant, or service provider in response to the requirements of the Procuring Entity as stated in the Bidding Documents. (IRR of RA No. 12009, Section 5[c]).

Bidder – a supplier, manufacturer, distributor, contractor, consultant, and service provider, whether public or private, who submits a Bid in response to the requirements of the Procuring Entity as stated in the Bidding Documents. (IRR of RA No. 12009, Section 5[d]).

Bidding Documents – the documents issued by the Procuring Entity as the basis for Bids, furnishing all information necessary to prospective bidder to prepare a Bid for the Goods, Infrastructure Projects, and Consulting Services required by the Procuring Entity. (IRR of RA No. 12009, Section 5[e]).

Consultant - refers to a citizen, or any corporate body or commercial company duly organized and registered under the laws where it is established, habitually established in business and engaged in providing Consulting Services.

Consulting Services – refer to services for Infrastructure Projects and other types of projects or activities of the government requiring adequate external technical and professional expertise that are beyond the capability or capacity of the government to undertake such as, but not limited to: (i) advisory and review services; (ii) pre-investment or feasibility studies; (iii) design; (iv) construction supervision; (v) management and related services; and (vi) other technical services or special studies. (IRR of RA No. 12009, Section 5[i])

Contract – refers to the agreement entered into between the Procuring Entity and the Supplier or Manufacturer or Distributor or Service Provider for procurement of Goods and Services; Contractor for Procurement of Infrastructure Projects; or Consultant or Consulting Firm for Procurement of Consulting Services; as the case may be, as recorded in the Contract Form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.

Contract Price - the price payable to the Supplier under the Contract for the full and proper performance of its contractual obligations.

Effective Date of the Contract – the date indicated in the contract. However, the Consultant shall commence performance of its obligations only upon receipt of the Notice to Proceed.

Framework Agreement – is a procurement strategy which shall be in the nature of an option contract between the Procuring Entity and the bidder that stipulates the terms and conditions to be applied in subsequent contracts for the procurement of Goods, Infrastructure Projects, and Consulting Services with a single or multiple contractor, manufacturer, supplier, distributor, consultant, and service provider to expand the pool of prospective bidders, take advantage of economies of scale, minimize the administrative burden of conducting separate procurement activities, and generate time and money savings. (IRR, Sections 16.1 and 16.2).

Foreign-funded Procurement or Foreign-Assisted Project– refers to the acquisition of Goods, Consulting Services, and the contracting for Infrastructure Projects by the Government of the Philippines which are wholly or partly funded by foreign loans or grants pursuant to a Treaty or International or Executive Agreement.

Goods – refer to (i) all items, supplies, and materials, whether in the nature of equipment, furniture, stationery, materials for construction, or personal property of any kind, needed in the transaction of public businesses or in the pursuit of any government undertaking, project or activity; or (ii) general support services which pertain to all types of services except Consulting Services and Infrastructure Projects, such as the repair and maintenance of equipment and furniture, as well as trucking, hauling, janitorial, security, and related or analogous services. (IRR of RA No. 12009, Section 5[n])

Infrastructure Projects – include the construction, improvement, rehabilitation, demolition, repair, restoration, or maintenance of roads and bridges, railways, airports, seaports, communication facilities, civil works components of information technology projects, irrigation, flood control and drainage, water supply, sanitation, sewerage and solid waste management systems, shore protection, energy/power and electrification facilities, national buildings, school buildings, hospital buildings, and other related construction projects of the government. Also referred to as “civil works” or “works;” (IRR of RA No. 12009, Section 5[r])

Online submission – pertains to the submission of the short-listing documents and bids for Consulting Services through electronic means or through the e-bidding facility of the PhilGEPS.

Project – refers to a specific or identified procurement covering Goods, Infrastructure Projects or Consulting Services. A Procurement Project shall be described, detailed, and scheduled in the Project Procurement Management Plan prepared by the agency which shall be consolidated in the procuring entity's Annual Procurement Plan.

Supplier – refers to a citizen, or any corporate body or commercial company duly organized and registered under the laws where it is established, habitually established in business and engaged in the manufacture or sale of the merchandise or performance of the general services covered by his bid. Supplier as used in these Bidding Documents may likewise refer to a manufacturer, distributor, contractor, consultant, or service provider.

Verified Report – refers to the report submitted by the Implementing Unit to the HoPE setting forth its findings as to the existence of grounds or causes for termination and explicitly stating its recommendation for the issuance of a Notice to Terminate.

Part I

Section I. Request for Expression of Interest

Notes on the Request for Expression of Interest

The Request for Expression of Interest provides information that enables potential Bidders to decide whether to participate in the procurement at hand. The Request for Expression of Interest shall be:

- a) In line with the principle of transparency and competitiveness and to ensure the widest possible dissemination thereof, all requests for expression of interest shall be published continuously by the Procuring Entity, for at least seven (7) calendar days in the Philippine Government Electronic Procurement System (PhilGEPS), on any conspicuous place in the premises of the Procuring Entity, and in the website or social media platforms of the Procuring Entity, if available, or such other channels as may be authorized by the Government Procurement Policy Board (GPPB), and the website prescribed by the foreign government/foreign or international financing institution, if applicable.
- b) For justifiable reasons, a Procuring Entity that cannot publish procurement opportunities in its website, social media platform, or such other channels authorized by the GPPB shall publish its invitation to bid, at least once, in a newspaper of general nationwide circulation.

Apart from the essential items listed in the Bidding Documents, the Request for Expression of Interest should also indicate the following:

- a) The date of availability of the Bidding Documents, the place where it may be secured and the deadline for submission of the Expression of Interest (EOI) together with the application for eligibility;
- b) The procurement strategy/ies;
- c) The set of criteria and rating system for short-listing of prospective bidders to be used for the particular contract to be Bid, which shall consider the following, among others:
 - i) Applicable experience of the consultant and members in case of joint ventures, considering both the overall experiences of the firms or, in the case of new firms, the individual experiences of the principal and key staff, including the times when employed by other consultants;
 - ii) Qualification of personnel who may be assigned to the job vis-à-vis extent and complexity of the undertaking; and
 - iii) Current workload relative to capacity.
- d) The number of consultants to be short-listed and the procedure to be used in the evaluation of Bids of short-listed consultants, *i.e.*, QBE or QCBE; and if QCBE, the weights to be allocated for Technical and Financial Proposals; and
- e) The contract duration.

In the case of World Bank funded projects, the Request for Expression of Interest shall be sent to all who have expressed an interest in undertaking the services as a result of any General Procurement Notice issued. In addition, it shall also be sent to all heads of associations of consultants within the area where the project will be undertaken.



REQUEST FOR EXPRESSION OF INTEREST FOR

PROCUREMENT OF CONSULTANCY SERVICES

FOR CAMPAIGN DEVELOPMENT, MANAGEMENT, AND

IMPLEMENTATION OF THE INVESTOR PROTECTION WEEK (IPW)

2025 (CB No. 025-034)

- 1) The Securities and Exchange Commission (SEC), through the FY 2025 Annual Operating Budget of SEC, intends to apply the sum of **Twelve Million Sixty-One Thousand Pesos (Php12,061,000.00)** being the Approved Budget for the Contract (ABC) to payments under the contract for the **Procurement of Consultancy Services for Campaign Development, Management, and Implementation of The Investor Protection Week (IPW) 2025**. Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
- 2) The SEC now calls for the submission of short-listing documents for the abovementioned Project, which main objective is to engage a consultant which shall undertake the concept development, design and layout, extensive research, editorial services, photography, hair and make-up services, and production, digital publication, printing and delivery services. Short-listing documents of interested consultants must be duly received by the Bids and Awards Committee (BAC) Secretariat on or before **23 September 2025 at 10:00 AM** at The SEC Headquarters, 7907 Makati Ave., Salcedo Village, Bel-Air, Makati City. Applications for eligibility will be evaluated based on a non-discretionary "pass/fail" criterion.
- 3) Interested Bidders may obtain further information from the SEC and inspect the Bidding Documents at the address given below from 7:00 A.M. to 4:00 P.M.
- 4) The BAC shall draw up the short-list of consultants from those who have submitted Expression of Interest, including the short-listing documents, and have been determined as eligible in accordance with the provisions of Republic Act (RA) No. 12009, otherwise known as the "New Government Procurement Act", and its Implementing Rules and Regulations (IRR). The short-list shall consist of a maximum of five (5) prospective bidders who will be entitled to submit bids. The BAC shall consider the short list should less than five (5) prospective bidders apply for eligibility and short listing, and actually pass the eligibility or pass the minimum score required.
- 5) The criteria and rating system for short-listing are:
 - i. Experience and capability of the consultant (60%)
 - ii. Qualification of key personnel (20%)
 - iii. Current workload of the personnel relative to capacity (20%)

- 6) Bidding will be conducted through competitive selection using non-discretionary “pass/fail” criterion as specified in the Implementing Rules and Regulations (IRR) of RA No. 12009. 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) 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.
- 8) The Procuring Entity shall evaluate bids in accordance with Section 62.2.1.2, Rule IX of the IRR of RA 12009, the Commission shall adopt the Quality-Cost Based Evaluation (QCBE) procedure, with the Technical Proposal given a weight of eighty-five percent (85%) and the Financial Proposal given a weight of fifteen percent (15%). The contract shall be awarded to the Highest Rated and Responsive Bidder (HRRB).
- 9) Short-Listing Documents must be received by the Procuring Entity’s BAC at the address indicated in the Request for Expression of Interest or through online submission on or before the date and time indicated in the **SDS**.
- 10) All Bids must be accompanied by a bid security in any of the acceptable forms and in the amount stated in **ITB** Clause 16.
- 11) The certification as to the current workload relative to capacity shall be made in accordance with the Instructions to Bidders in relation to TPF 5 therein.
- 12) The Securities and Exchange Commission 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 70 of RA No. 12009 and its IRR, without thereby incurring any liability to the affected bidder or bidders.
- 13) For further information, please refer to:
<https://www.sec.gov.ph>
<https://www.philgeps.gov.ph>

12 September 2025

SGD

Oliver O. Leonardo
*BAC Chairman for IT Goods and
Consulting Services*

Section II. Short-Listing Documents

Notes on the Short-Listing Documents

This Section provides the information necessary for prospective bidders to prepare responsive Short-listing Documents, in accordance with the requirement of the Procuring Entity.

No changes shall be made to the provisions contained in this Section. Additional information or requirements specific to each procurement shall be specified in the Short-listing Data Sheet (SDS).

1) Short-listing 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 or 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%), **subject to the latest foreign investment negative list**. 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 Joint Venture Agreement (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 **SDS**.

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 **SDS**.

2.5. 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 eligibility requirements or statements, the bids, and all other documents to be submitted to the BAC must be in English. The following eligibility requirements, together with the Short-listing 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 of this Section for purposes of determining eligibility of prospective bidders:

- a) PhilGEPS Certificate of Registration (Platinum Membership) in accordance with Section 20 of the IRR.
- b) Statement 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 procurement project, within the relevant

period provided in the **SDS which shall not exceed ten (10) years.** The statement shall include, for each contract, the following:

- i) the name and location of the contract;
 - ii) date of award of the contract;
 - iii) type and brief description of Consulting Services;
 - iv) consultant's role (whether main consultant, or partner in a JV)
 - v) amount of contract;
 - vi) contract duration; and
 - vii) certificate of satisfactory completion or equivalent specified in the **SDS** issued by the client, in the case of a completed contract.
 - c) 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.
- 2.6. [If applicable] the JVA in case the joint venture is already in existence, or in the absence of a JVA, a duly notarized statement from all the potential joint venture partners stating that they will enter into and abide by the provisions of the JVA in the event that the bid is successful.
- 2.7. 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 or 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, as defined in Section 20.9.2 of the IRR, except for countries identified by the Department of Foreign Affairs (DFA) that will still require legalization (red ribbon) by the relevant Embassy or Consulate.
- 2.2 Prospective bidders may obtain a full range of expertise by associating with individual consultant/s and/or other consultants or entities through a JV. Foreign Consultants shall seek the participation of Filipino Consultants by entering into a JV with Filipino Consultants.
- 2.3 To facilitate the determination of eligibility, the BAC shall use the contents of the PhilGEPS electronic registry of manufacturers, suppliers, distributors, contractors, or consultants, in accordance with Section 20 of the IRR.

3) Format and Signing of Short-listing Documents

- 3.1 Prospective bidders shall submit their short-listing documents through their duly authorized representative on or before the deadline specified in Clause 5 of this Section.

3.2 The Short-listing 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 short-listing documents.

3.3 Any insertions, 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 Short-listing Documents

4.1 Prospective bidders shall enclose their short-listing documents described in Clause 2.1, in a sealed envelope marked "SHORT-LISTING DOCUMENTS."

4.2 The short-listing documents as indicated in the **SDS** 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 **SDS**;
- d) bear the specific identification of this Project indicated in the **SDS**; and
- e) bear a warning "DO NOT OPEN BEFORE..." the date and time for the opening of short-listing documents, in accordance with Clause 5.

4.4 Unsealed or unmarked envelopes or short-listing documents that cannot be opened or corrupted in case of online submission, as required in the Bidding Documents, shall be rejected. However, for manually submitted envelopes that are not properly sealed and marked as required in the Bidding Documents, the same shall be accepted; Provided, That the bidder or its duly authorized representative shall acknowledge such condition of the documents as submitted. The BAC shall assume no responsibility for misplacement of the contents of the short-listing documents, or for its premature opening.

5) Deadline for Submission of Short-listing Documents

Short-listing documents must be received by the Procuring Entity's BAC at the address indicated in the Request for Expression of Interest or through online submission on or before the date and time indicated in the **SDS**.

6) Late Submission of Short-listing Documents

Any short-listing documents submitted after the deadline for submission and receipt prescribed in Clause 5 of this Section 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 short-listing documents, the Bidder's name, its representative and the time the short-listing documents were submitted late.

7) Modification and Withdrawal of Short-listing Documents

7.1 The prospective bidder may modify its short-listing documents before the deadline for the submission and receipt of short-listing documents. For manual submission and receipt of short-listing documents, the prospective bidder shall not be allowed to retrieve its short-listing documents but shall be allowed to submit the modification to the short-listing documents equally sealed, properly identified, linked to its bid marked

as “SHORT-LISTING 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. For online submission, where bidders modify their short-listing documents, they shall not be allowed to retrieve their short-listing documents but shall only be allowed to submit the short-listing modification equally secured and properly identified, and it shall be labelled as a “modification” of the one previously submitted. The time indicated in the latest short-listing receipt page generated shall be the official time of submission. Short-listing documents submitted after the deadline shall not be accepted.

- 7.2 A prospective bidder may, in writing, withdraw its short-listing documents before the deadline for the submission and receipt of short-listing documents.
- 7.3 Short-listing 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 short-listing documents shall not be permitted to submit another set, directly or indirectly, for the same project. A prospective bidder that acquired the short-listing 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 short-listing documents.

8) Opening and Preliminary Examination of Short-listing Documents

- 8.1 The BAC will open the envelopes containing the short-listing 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 **SDS**. The prospective bidders’ representatives who are present shall sign a register evidencing their attendance.
- 8.2 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 on the PhilGEPS website and the website of the Procuring Entity concerned.
- 8.3 Letters of withdrawal shall be read out and recorded during the opening of short-listing documents and the envelope containing the corresponding withdrawn short-listing documents shall be returned unopened to the withdrawing prospective bidder.
- 8.4 The short-listing 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 short-listing documents vis-à-vis a check of the required documents.
- 8.5 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 short-listing document required, it 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, it shall be considered eligible to participate in the bidding, and the BAC shall mark the set of short-listing 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 short-listing 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 **SDS** 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 **SDS**.
- 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

Decisions of the Procuring Entity at any stage of the procurement process may be protested to the HoPE; Provided, That a prior request for reconsideration should have been filed by the party concerned to the BAC and the same has been resolved.

Section III. Short-listing Data Sheet

Notes on the Short-listing Data Sheet

This Section is intended to assist the Procuring Entity in providing the specific information and requirements in relation to corresponding clauses in the short-listing documents, and has to be prepared for each specific procurement.

The Procuring Entity should specify in this Section the information and requirements specific to the circumstances of the Procuring Entity, the processing of the eligibility, and the rules that will apply in the determination and evaluation of eligibility.

In preparing this Section, the following aspects should be checked:

- a) Information that specifies and complements the provisions of the short-listing documents must be incorporated.
- b) Amendments and/or supplements, if any, to the provisions of the short-listing documents as necessitated by the circumstances of the specific procurement, must also be incorporated.

Short-listing Data Sheet

Short-listing Documents	
1.2	No further instructions.
1.3	No further instructions.
2.1 (b)	The statement of all ongoing and completed government and private contracts shall include all such contracts within Five (5) years prior to the deadline for the submission and receipt of short-listing documents.
2.1 (b) (vii)	The Service Provider/Consultancy Firm must show certification or any equivalent document from each of its clients, as stated in the Statement of ALL Completed Contracts form, that it is in good standing and has implemented similar projects to its client's expectations. This particular requirement of submitting certification or equivalent document shall only apply to contracts that are similar in nature to the project at hand.
4.2	Each prospective bidder shall submit one (1) original copy of its eligibility documents and electronic copy of bids shall be submitted upon instruction of the BAC thru its SEC Secretariat. The eligibility requirements or statements, the bids, and all other documents to be submitted to the BAC must be in English. The following eligibility requirements, together with the Short-listing 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 of this Section for purposes of determining eligibility of prospective bidders: a) PhilGEPS Certificate of Registration (Platinum Membership) in accordance with Section 20 of the IRR. b) Statement 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 procurement project, within the relevant period provided in the SDS which shall not exceed ten (10) years. The statement shall include, for each contract, the following: i) the name and location of the contract; ii) date of award of the contract; iii) type and brief description of Consulting Services; iv) consultant's role (whether main consultant, or partner in a JV) v) amount of contract; vi) contract duration; and vii) certificate of satisfactory completion or equivalent specified in the SDS issued by the client, in the case of a completed contract. c) 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.

4.3 (c)	Oliver O. Leonardo BAC Chairman for IT Goods and Consulting Services The SEC Headquarters, 7907 Makati Ave., Salcedo Village, Bel-Air, Makati City Email address: jamroa@sec.gov.ph
4.3 (d)	The name of the Project is “Procurement of Consultancy Services for Campaign Development, Management, And Implementation of The Investor Protection Week (Ipw) 2025 (Cb No. 025-034).
5	The address for submission of short-listing documents is at the 7th Floor, Procurement Unit, The SEC Headquarters, 7907 Makati Ave., Salcedo Village, Bel-Air, Makati City. The deadline for submission of short-listing documents is on 23 September 2025 (10:00 AM).
8.1	The place of opening of short-listing documents is at the 7th Floor, Procurement Unit, The SEC Headquarters, 7907 Makati Ave., Salcedo Village, Bel-Air, Makati City. The date and time of opening of short-listing documents is 23 September 2025 (10:15 AM).
9.1	Similar contracts shall refer to any consultancy services for the development, management, and implementation of communication plan and media production or any synonymous project/s as described in the Terms of Reference.
9.2	The BAC shall draw up the short-list of consultants from those who have submitted Expression of Interest, including the short-listing documents, and have been determined as eligible in accordance with the provisions of Republic Act (RA) No. 12009, otherwise known as the “New Government Procurement Act”, and its Implementing Rules and Regulations (IRR). The short-list shall consist of a maximum of five (5) prospective bidders who will be entitled to submit bids. The BAC shall consider the short list should less than five (5) prospective bidders apply for eligibility and short listing, and actually pass the eligibility or pass the minimum score required. The criteria and rating system for short-listing are: iv. Experience and capability of the consultant (60%) v. Qualification of key personnel (20%) vi. Current workload of the personnel relative to capacity (20%) To qualify for the shortlisting, the prospective bidder should achieve an overall minimum score of 70 points.

Section VII. Philippine Bidding Document Related Forms

Short-Listing Documents Submission Form 23

List of all Ongoing Government and Private
Contracts Including Contracts Awarded but not yet Started.....24

Statement of The Consultant’s Nationality.....25

Statement of The Consultant’s Nationality.....27

SHORT-LISTING 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 short-listing documents in compliance with the Short-listing 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 or 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 Short-listing Documents Submission Form shall be a ground for our disqualification.

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

List of all Ongoing Government and Private Contracts Including Contracts Awarded but not yet Started

Business Name: _____

Business Address: _____

Name and Location of Project Name of Client/ Contact Person/Contact Number/Email Address	Date of Award of the Contract	Type and Brief Description of Consulting Services	Amount of Contract	Project Duration (Start Date – Completion Date)	Consultant's Role (Main Consultant/ Subconsultant/ Partner in a JV)
<u>Government:</u>					
<u>Private:</u>					

Submitted by : _____

(Printed Name and Signature)

Designation : _____

Date : _____

Instructions:

- i. 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 being bidded) prior to opening of bids.
- ii. If there is no ongoing contract including awarded but not yet started as of the aforementioned period, state none or equivalent term.

STATEMENT OF THE CONSULTANT'S NATIONALITY

Securities and Exchange Commission

Bids and Awards Committee
SEC Headquarters, 7907
Makati Ave. Salcedo Village,
Brgy. Bel-Air, Makati City

Ladies/Gentlemen:

In compliance with the requirements of the Securities and Exchange Commission – Bids and Awards Committee (SEC-BAC) for the bidding of the **Procurement of Consultancy Services for Campaign Development, Management, and Implementation of The Investor Protection Week (IPW) 2025**, I/we hereby declare the following:

1. [Select one and delete the rest].

[If domestic entity consultant] That (Name of the consultant) is a domestic sole proprietorship/partnership/corporation/joint venture organized or formed under the laws of the Philippines;

[If foreign entity consultant] That (Name of the consultant) is a foreign sole proprietorship/partnership/corporation/joint venture organized or formed under the laws of the (Name of the country);

[If foreign entity consultant] That (Name of the consultant) is registered with the Securities and Exchange Commission and/or any agency authorized by the laws of the Philippines;

2. That the following are the proposed Personnel:

Name of ALL Proposed Personnel	Proposed Position	Job Status*	Nationality	Proof of Identification
1.	Lead Consultant		Filipino	
2.	Team Member		Filipino	
3.	Team Member		Filipino	
4.	Team Member		Filipino	
5.	Team Member		Filipino	

**indicate whether Permanent (P) or Freelancer (F)*

3. That attached herewith are the Curriculum Vitae of the above-mentioned personnel (*Annex/es*); and
4. That the undersigned is/are the authorized representative/s for this public bidding as evidenced by herewith attached notarized authority.

Very truly yours,

Signature: _____

Name and Title of Authorized Signatory: _____

Name of Consultant/Company: _____

Address: _____ Contact No/s. _____

(Note: Please attach the notarized authority of the consultant's signatory for the public bidding for this project)

FORMAT OF CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF

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 relevant training most pertinent to the tasks on project at hand and aligned with the technical qualifications or certifications mentioned in the TOR. Describe the degree of responsibility held by staff member on relevant previous projects and give dates and locations. Use about half a page.]

Education:

[Summarize college/university and other specialized education of staff members, giving names of schools, dates attended, and degrees obtained. Use about one quarter of a page.]

Employment Record:

[Starting with present position, list in reverse order every employment held. List all positions held by staff member since graduation, giving dates, names of employing organizations, titles of positions held, and locations of projects. For experience in the last [insert relevant period which shall not exceed ten (10) years] years, also give types of activities performed and client references, where appropriate. Use about two pages.]

Languages:

[For each language, indicate proficiency: excellent, good, fair, or poor in speaking, reading, and writing.]

Certification:

I, the undersigned, certify that to the best of my knowledge and belief, these data correctly describe me, my qualifications, and my experience.

Commitment:

I also commit to work for the Project in accordance with the time schedule as indicated in the contract once the firm is awarded the Project.

[Signature of staff member and authorized representative of the firm] Date: _____
Day/Month/Year

Full name of staff member: _____

Full name of authorized representative: _____



PROCUREMENT OF CONSULTANCY SERVICES FOR CAMPAIGN DEVELOPMENT, MANAGEMENT, AND IMPLEMENTATION OF THE INVESTOR PROTECTION WEEK (IPW) 2025

I. BACKGROUND AND OBJECTIVES

The Securities and Exchange Commission (“SEC” or the “Commission”) is the national government regulatory agency mandated to register and oversee corporations, and to develop and regulate the capital market toward good corporate governance, protection of investors, widest participation of ownership, and democratization of wealth.

As part of its mandate, the Commission adopted the SEC Communication, Advocacy, and Network (SEC CAN!) Strategic Initiative to increase the knowledge and awareness of the public about the Commission’s initiatives, programs, and activities. The SEC CAN! Initiative entails the creation and dissemination of multimedia information, education, and communication materials, and the conduct of nationwide on-ground information drives.

To promote financial literacy and investor protection, the Commission headed the celebration of the Investor Protection Week (IPW), which was institutionalized through Presidential Proclamation No. 846 signed on 15 November 2019, as a way of addressing the growing number of reported investment scams.

The IPW is organized in alignment with the World Investor Week (WIW), a global initiative spearheaded by the International Organization of Securities Commissions (IOSCO), thereby situating the Commission’s efforts within a broader international campaign. This initiative reinforces the Commission’s sustained efforts to inform and educate the public on financial literacy, investor rights and responsibilities, and investment risks, among others.

Further, the Commission hosts the 89th SEC Anniversary and Stakeholders’ Night, the culminating event of IPW to recognize and celebrate the invaluable contributions of our regulatory partners, market participants, and various organizations in advancing the Commission’s advocacy of investor protection, good corporate governance, and capital market development. This event also serves as an opportunity to strengthen relationships and renew commitment on financial literacy and market integrity.

During the IPW and Stakeholders’ Night, the SEC produces educational materials and organizes several events and activities aimed at promoting financial literacy and investor protection. To ensure the timeliness and effectiveness of the release of educational materials and the conduct of activities for the aforementioned events, the Commission approved the procurement of consultancy services for campaign

development, management, and implementation, including video production and events management.

II. SCOPE OF WORK

The Consultant shall work in close coordination with the Strategic Partnership and Advocacy Division (“SPAD”) and the Corporate Communication Division (“CCD”) of the Commission on the following:

A. Campaign Development

The Consultant shall develop a communication plan, which shall include stakeholder analysis, communication strategies, three (3) concepts or theme ideas, a message house, appropriate communication activities and materials in various formats for placement across all types of media, evaluation framework/metrics, and a project timeline, among others.

Deliverables:

- Organize and attend conceptualization and production meetings;
- Develop and present three (3) concepts or theme studies for the campaign, for the review and approval of the SPAD, CCD, and the Commission;
- Following approval of the theme, provide a complete Communication Plan with a timeline of activities, content calendar, implementation plan, and implementation tracker;
- Revise concept or theme and project plan, as necessary;
- Provide talent management for a maximum of three (3) talents or influencers, subject to final approval. If approved, the Consultant shall be responsible for securing and managing the talents, handling all aspects of coordination, and ensuring that all associated costs (e.g., talent fees and related expenses) are covered within the approved budget;
- The Consultant shall include the organization of the IPW Advocacy Run as the kick-off promotional IPW activity, aimed at engaging both the Commission’s internal and external stakeholders in a fun and participatory way while reinforcing the SEC’s advocacy on financial literacy and investor protection.
- Prepare a Terminal Report which shall include key performance metrics, assessment of the effectiveness of the campaign, and recommendations for improvements that the Commission may implement in the future. The report must be submitted within twenty (20) days after the end of the campaign; and

- Submit other deliverables as may be required by the Commission.

B. Production of IEC Materials

The Consultant shall lead the production of IEC materials, such as videos, photos, art cards, reels, and other content, ensuring that all materials have prior sign-off from the Commission (SPAD and CCD) and that there is consistent coordination throughout the production process.

The Consultant shall primarily plan, schedule, edit, and provide creative direction for the production of the IEC materials, including animation and motion graphics.

The approved budget for the contract shall cover expenses related to transportation, hair and makeup, talent management, placement, and other out-of-pocket or miscellaneous expenses.

Deliverables:

- Provide up to three (3) studies for each IEC material identified and approved under the campaign plan;
- Handle all preparatory work necessary to produce the IEC materials, including, but not limited to, scriptwriting, location shoots, and identification of talents, subject to clearance from the Commission;
- Develop IEC materials that shall include, but will not be limited to, the following:
 - At least five (5) Social Media Art Cards;
 - At least five (5) Social Media Reels;
 - At least five (5) audio-visual presentations with at least five (5) minutes length per video highlighting the Commission's accomplishments and other initiatives.
- Post the IEC materials on all appropriate platforms of the talents and influencers to be shared and/or crossposted by the Commission through its official social media platforms;
- Revise the IEC materials based on comments and instructions from the SPAD, CCD, and Commission; and
- Turnover all raw, editable, or layered files used in the production of the IEC materials through hard drive and Google drive.

C. Event Production and Management

The Consultant shall lead the planning, management, and conduct of at least two (2) events, and shall provide all logistical, talent, and technical requirements, including stage and backdrop design, lights and sounds, special effects, LED walls, and other equipment, as needed, based on the approved plan. The Consultant shall likewise ensure that all equipment/materials have prior sign-off from the Commission (SPAD, CCD), and maintain constant coordination throughout both the event execution and content production processes.

The Consultant shall also provide the creative, production, and technical teams, including the Stage/Technical Director, Writer, Stage Manager, Production Assistants, Photo and Video Documentation personnel, and other crew, as may be necessary.

Furthermore, the Consultant shall coordinate additional reasonable logistical requirements directly related to the effective execution of campaign events, which may include, but are not limited to, event supplies, equipment rentals, and other minor support needs.

All related expenses for the conduct of the events shall be covered by the approved budget for the contract.

Deliverables:

Kick Off Activity: IPW Advocacy Run

- Organize and implement the **IPW Advocacy Run** as part of the IPW activities, with a target capacity of at least 400 stakeholders. This shall cover the full scope of event management, which includes, but is not limited to, the following:
 - Coordination with local authorities for the reservation of the venue and the processing of permits, security, traffic management, etc.;
 - Preparation of the route, ensuring safety, accessibility, proper installation of directional markers, and designated hydration stations;
 - End-to-end registration management, including online and on-site sign ups, race bib assignment, and distribution of the official race kit, which shall include a singlet, race bib with timing chip, loot bag, and medal;
 - Provision of necessary medical support, including the lease of an ambulance and deployment of race marshalls, volunteers, and adequate stand-by health personnel along the race routes and at the start and finish;
 - Execution of post-run ceremony, including awarding ceremonies;
 - Production of banners for the starting line and finish line, as well as the distance markers to be placed along the race route;
 - Ensure the branding aligns with the official IPW campaign theme and incorporates investor protection and financial literacy messages across race materials and other event components; and
 - Provision of documentation (photos, videos, participant database, race results, and post-event report) of the IPW Advocacy Run.

IPW Fair and Stakeholders Night

- Arrange the venue setup, including, but not limited to, stage design/decoration, venue layout and styling, printing and production of pull-up banners, catalogue, directional signage, and registration counter.
- Prepare all technical requirements, including but not limited to Audio-Visual and Lighting System (speakers, microphones, etc.), LED wall screen, backdrop, stage/set design, LED projector and screen, Stage truss system, Speakers' technical requirements, Microphones (lapel and wireless), Amplifiers, Laptops (mac and windows) with appropriate connectors, Presentation Clicker/Laser Pointer/Easel, Appropriate cables and video adapters (VGA, HDMI, etc.),

D. Meals and Refreshments for IPW and Stakeholders' Night

The Consultant shall provide meals and refreshments to support the smooth implementation of **all campaign-related events**. Services must consider both practicality and quality during the weeklong IPW activities, as well as offer a formal, high-end experience for the culminating Stakeholders' Night event.

Likewise, the Consultant must coordinate any additional food, beverage, or meal requirements, including related logistical needs, for activities directly related to the campaign and subsequent events, provided that all such expenses shall be within the approved contract budget.

Deliverables:

Meals and Refreshments for IPW Production Team

- Provide complete, freshly prepared hot meals (at least one viand, rice, vegetables, dessert, and drink) for approximately 60 pax, covering the creative, production, and technical teams, as well as the SEC Technical Working Group (TWG), during all campaign activities.
- Meals must be nutritious, hygienically packed, and delivered on time, with accommodations for dietary restrictions such as vegetarian, halal, or allergy-sensitive options.
- Daily menus should vary.

Snacks and Light Meal Allocation for IPW Participants

- Provide light snacks and refreshments for approximately 300 pax, suited to the time, setting, and audience of each IPW activity.
- Snacks must be individually packaged or attractively presented buffet-style, depending on the event format, and must include beverages.
- Maintain sanitation and food safety protocols, especially for shared food service.

Catering for Stakeholders' Night

- Provide high-end, formal catering for approximately 300 pax during the Stakeholders' Night, befitting the event's prestige and distinguished guest list, including VIPs, awardees, and partners.
- Catering shall include:

- A complete multi-course meal (e.g., appetizer, soup or salad, main entrée with sides, dessert, and hot/cold beverages)
- Elegant presentation using quality ingredients and refined plating
- Professional catering staff, full table service or buffet attendants, and on-site coordinator
- Catering designs, including table setup, linens, floral centerpieces, food styling, and service attire, must be thematically consistent with the official Stakeholders' Night motif to enhance the overall ambiance and guest experience.
- Provide options for plated, semi-buffet, or cocktail-style reception, depending on final program flow and seating arrangements.

Coordination and Documentation

- Coordinate all additional food or meal-related needs for campaign-related events, including internal planning sessions, workshops, video shoots, and media events.
- Maintain a detailed log of all food services rendered, including:
 - Event/activity name;
 - Date/time of service;
 - Type of meal/snack;
 - Number of recipients;
 - Provider details and cost
- Submit a final summary report on food or meal-related provisions and services, including menu samples, photos, and feedback if available. The summary report shall be included in the terminal report.

E. Awards and Tokens

The Consultant shall provide the plaques and tokens for awardees, as well as tokens and certificates for the speakers and exhibitors. All related expenses for these items shall be covered by the approved contract budget.

The Commission shall provide the design and specifications for the plaques to ensure they meet the required standards and expectations.

The total quantity of items to be produced and delivered shall be approximately 450 pieces overall, sufficient to cover both the IPW activities and the Stakeholders' Night.

Deliverables (appropriate for approximately 450 pax):

- Plaques and tokens for Awardees during Stakeholders' Night
 - Produce and deliver high-quality plaques and tokens for all campaign or event awardees.
 - Ensure all items are customized with appropriate event branding, names, and titles.
 - Coordinate timely distribution during the awarding ceremony.
 - Ensure all items are properly labeled, securely packaged, and appropriately styled to match the significance of the recognition
- Certificate and Tokens for Speakers and Exhibitors for the investor fair.
 - Prepare and provide personalized tokens of appreciation and certificates for all event speakers and exhibitors.
 - Ensure branding consistency and professional presentation.
 - Certificates must be printed on high-grade paper with appropriate SEC markings, seals, and signatures.
 - Ensure all items are properly labeled, securely packaged, and appropriately styled to match the significance of the recognition
- Plaques and Tokens for Extension Offices
 - Provide plaques and tokens for extension offices, recognizing their support, contribution, or participation in campaign activities.
 - Ensure all items are properly labeled, securely packaged, and appropriately styled to match the significance of the recognition.

- Coordination and Quality Assurance
 - Source and coordinate the production of all awards and tokens in line with the campaign's branding and quality standards.
 - Oversee the packaging, transport, and on-site handling to prevent damage or loss.
- Budget Compliance and Documentation
 - All related expenses shall be covered within the approved contract budget.
 - Maintain a detailed inventory and cost breakdown of all items produced and distributed.
 - Submit documentation as part of final project reporting within twenty (20) calendar days after the end of the campaign.

IV. TIMELINE

PHASE	ACTIVITY	TARGET DATE OF DELIVERY
Phase 1: Initial Onboarding and Planning	Initial Onboarding	Within two (2) calendar days when the Notice to Proceed is issued
	Research, Planning, and Assessment	
Phase 2: Campaign Development	Content Creation and Strategy Finalization	Within fourteen (14) calendar days upon turnover of technical content and other reference materials
	Production and Approval of IEC Materials	Within fourteen (14) calendar days upon turnover of technical content and other reference materials, or at least seven (7) days from when the IEC material will be posted or utilized
Phase 3: Pre-Campaign Preparation	Logistics Preparations: Approval of permits, venue preparation, audio/visual equipment, event materials, technical support, and other related preparations	According to the approved campaign plan and schedule (but the campaign must be launched not later than 10 November 2025)
Phase 4: Campaign Launch and Execution	Implementation of all scheduled activities, such as events, activities, and social media postings	According to approved schedule (but the campaign must be launched not later than 10 November 2025)
	Monitoring of campaign performance through analytics and feedback. <i>*Make real-time adjustments, when necessary</i>	According to the approved campaign plan and schedule
Phase 5: Post-Campaign	Data collection, monitoring, and analysis of relevant	Within fifteen (15) calendar days after the end of the

Evaluation	campaign analytics	campaign
	Preparation and Submission of Terminal Report	Within twenty (20) calendar days after the end of the campaign
	Turnover of all files, documents, and materials	

V. GREEN SPECIFICATIONS

1. Event Production and Management

The Consultant is encouraged to observe environmentally sustainable practices throughout the duration of the project. These include, but are not limited to:

- a. Utilizing energy-efficient equipment (e.g., LED lighting, eco-mode projectors).
- b. Using digital alternatives to printed materials when possible.
- c. Employing reusable stage decorations, signage, and booths.
- d. Minimizing single-use plastics and opting for recyclable or compostable materials.
- e. Ensuring proper waste segregation during event days.
- f. Encouraging suppliers and partners to adopt green practices aligned with the SEC's sustainability goals.

2. Meals and Refreshments

- a. The Consultant shall have its own environmental policy. The environmental policy shall cover environmental procurement, the reduction of waste and energy consumption, and water saving.

- b. The service supplier shall provide local or regional products or those which are sustainably produced (produced according to good agriculture practices, organic, avoiding overfishing, no products from threatened species) when offering food and beverages.
- c. The service supplier shall provide a vegetarian option.
- d. The service supplier shall eliminate the use of non-essential disposable products like plastic bags, single-use utensils, etc. When disposable products are used, the supplier shall use recycled materials where possible.
- e. The service supplier shall post its environmental policy in places where employees can easily notice them.

3. Production of IEC Materials

- a. Where feasible, prioritize digital dissemination over print to reduce paper consumption.
- b. Printed materials, if necessary, must use sustainably sourced or recycled paper and eco-friendly ink.

VI. CONTRACT TERM

The Consultant shall complete the scope of work as specified above within October to December 2025 and shall fulfill or submit certain deliverables to the SEC in accordance with the proposed timetable, which must be approved by the Commission.

VII. PROPOSED BUDGET FOR THE CONTRACT

The approved budget for the contract is **Twelve Million Sixty One Thousand Pesos Only (12,061,000.00)**, inclusive of all applicable taxes, fees, and incidental expenses. This covers the Consultant's service fees, other professional fees, actual project costs, out-of-pocket expenses for transportation, communication, food, and all other necessary or miscellaneous expenses.

VIII. TERMS OF PAYMENT

<u>Milestone</u>	<u>Deliverables</u>	<u>Percentage</u>
Milestone 1 : Completion of Phases 1 and 2	- Submission and acceptance of Communication Plan with creative concept and project timeline - Research and planning	20%
Initial Onboarding, Research, Planning, Content Development, and Communication Strategy Finalization,	- Submission and acceptance of at least three proposed campaign themes and corresponding key messages - Approval of the main campaign theme and corresponding key messages. - Production and approval of initial IEC materials, including, but not limited to, art	

and Approval of IEC Materials	cards, reels, AVPs, based on the approved campaign theme and key messages - Coordination meeting documentation and approval of technical strategies	
Milestone 2: Completion of Phase 3 Pre-campaign preparations	- Finalization and approval of all logistical, technical, and event-related requirements - Conduct of technical rehearsals - Production of event designs - Approved floor plans and set-ups for IPW and Stakeholder's Night - Final list of catering and concessionaires arrangement	30%
Milestone 3: Completion of Phase 4 Campaign Launch and Execution	- Successful implementation of all scheduled campaign activities (IPW, Stakeholders' Night) - Execution of all IEC rollouts and event documentation (photos, videos, livestream, etc.) - Provision of production meals, snacks, and catering services to all external and SEC personnel - Distribution of awards, tokens, and certificates	30%
Milestone 4 : Completion of Phase 5 Post Campaign Evaluation and Turnover	- Submission and acceptance of Terminal Report - Summary report of food, tokens Production Meals and Refreshments for IPW Snacks and Light Meals for IPW Participants Meals for Stakeholders' Night Coordination and Documentation , and IEC deliverables with documentation - Turnover of all raw and final files, including, but not limited to, AVPs, photos, and reports, in physical and digital formats - Turnover of equipment and reusable collaterals, as acquired and fabricated under the approved project	20%

<u>TOTAL</u>	<u>100%</u>
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IX. METHODOLOGY

The procurement of consultancy services shall be undertaken through Competitive Bidding pursuant to Republic Act No. 12009, otherwise known as the New Government Procurement Act, and its Implementing Rules and Regulations. In accordance with Section 62.2.1.2, Rule IX of the IRR of RA 12009, the Commission shall adopt the Quality-Cost Based Evaluation (QCBE) procedure, with the Technical Proposal given a weight of eighty-five percent (85%) and the Financial Proposal given a weight of fifteen percent (15%). The contract shall be awarded to the Highest Rated and Responsive Bidder (HRRB).

Criteria	Score
Technical Proposal	85%
Financial Proposal	15%
Total Score	100%

X. QUALIFICATION

The Consultant must have a proven track record in **communication strategy development, campaign development and implementation, IEC materials production, and event production and management.**

The team that will handle the project must include the following key personnel, other additional manpower is at the discretion of the supplier:

Communication Strategist

- Bachelor's degree in Communications, Public Relations, Marketing, or any related field;
- At least five (5) years of work experience in communications, production services, event management, marketing, and/or any related field;
- Excellent in writing, editing, and communication research;
- Has handled similar projects in the past five (5) years; and
- Submit project portfolio for evaluation

Creative Director

- Bachelor's degree in Communications, Public Relations, Marketing, or any related field;
- At least five (5) years of work experience in production and/or event management;
- Has handled similar projects in the past five (5) years; and
- Present portfolio of productions they've directed/co-directed

Videographer / Photographer

- Professional photographer, preferably with a National Certificate in Photography;
- At least five (5) years of professional experience, preferably in at least one company included in the Top 500 Corporations;
- Must present portfolio; and
- Has complete professional photography equipment

Video Editor

- Bachelor's or vocational degree in Communication, Film Production, Videography, Cinematography, Broadcasting, or any related field;
- At least five (5) years of work experience in video editing ;
- Excellent writing and editing skills and
- Must present portfolio

Copywriter/Writer

- Bachelor's degree in Creative Writing, Communication, Journalism, or any related field;
- At least five (5) years of work experience in writing, editing, and scriptwriting for multimedia presentations;
- Can produce copies for viral and impactful social media content catering to the right audiences as targeted by the campaign; and
- Must present portfolio

Production Coordinator/Assistant

- Preferably with a Bachelor's degree in Events Management, Videography, or any related field;
- At least five (5) years of work experience in handling events and similar campaigns or projects, preferably for other government agencies or Top 500 companies; and
- Provide portfolio of past projects in which they were involved as coordinator/assistant

XI. CRITERIA FOR SHORTLISTING OF ELIGIBLE BIDDERS

To qualify for the shortlisting, the prospective bidder should achieve an overall minimum score of 70 points.

No.	Evaluation Criteria	Weight
1	Experience and capability of the consultant	60
	<i>Reputable consultant with demonstrated history of successful projects both in government and top corporations</i> - Handled more than 30 related projects in the last 10 years <i>(60 points)</i> - Handled more than 25 related projects in the last 10 years <i>(50 points)</i> - Handled more than 20 related projects in the last 10 years <i>(40 points)</i> - Handled more than 15 related projects in the last 10 years <i>(30 points)</i> - Handled less than 10 related projects in the last 10 years <i>(20 points)</i> - Handled less than 5 related projects in the last 10 years <i>(10 points)</i>	
2	Qualification of key personnel <i>*Scores of all key personnel will be averaged</i>	20
	2.1 Communication Strategist	
	<i>2.1.1 Professional Experience (Max: 10 points)</i> - More than 10 years of professional experience <i>(10 points)</i> 8 to 10 years of professional experience <i>(7 points)</i> 5 to 7 years of professional experience <i>(5 points)</i> 2 to 4 years of professional experience <i>(3 points)</i>	
	<i>2.1.2 Education Qualification (Max: 5 points)</i>	

	● Postgraduate degree (5 points) ● Bachelor's degree (3 points) ● Certifications or Trainings (2 points)	
	<i>2.1.3 Prior engagements in handling campaigns, producing videos, and managing events, or other related projects over the past 10 years (Max: 5 points)</i> ● 10 to 20 completed relevant projects (5 points) ● 5 to 10 completed relevant projects (3 points) ● 1 to 5 completed relevant projects (1 point)	
	2.2 Creative Director	
	<i>2.2.1 Professional Experience (Max: 10 points)</i> ● More than 10 years of professional experience (10 points) ● 8 to 10 years of professional experience (7 points) ● 5 to 7 years of professional experience (5 points) ● 2 to 4 years of professional experience (3 points)	
	<i>2.2.2 Education Qualification (Max: 5 points)</i> ● Postgraduate degree (5 points) ● Bachelor's degree (3 points) ● Certifications or Trainings (2 points)	
	<i>2.2.3 Prior engagements in handling campaigns, producing videos, and managing events, or other related projects over the past 10 years (Max: 5 points)</i> ● 10 to 20 completed relevant projects (5 points) ● 5 to 10 completed relevant projects (3 points) ● 1 to 5 completed relevant projects (1 point)	

	2.3 Videographer/Photographer	
	<i>2.3.1 Professional Experience (Max: 10 points)</i> • More than 10 years of professional experience (10 points) • 8 to 10 years of professional experience (7 points) • 5 to 7 years of professional experience (5 points) • 2 to 4 years of professional experience (3 points)	
	<i>2.3.2 Education Qualification (Max: 5 points)</i> • Bachelor's degree (5 points) • Certifications or Training (3 points)	
	<i>2.3.3 Prior engagements in handling campaigns, producing videos, and managing events, or other related projects over the past 10 years (Max: 5 points)</i> • 10 to 20 completed relevant projects (5 points) • 5 to 10 completed relevant projects (3 points) • 1 to 5 completed relevant projects (1 point)	
	2.4 Video Editor	
	<i>2.4.1 Professional Experience (Max: 10 points)</i> • More than 10 years of professional experience (10 points) • 8 to 10 years of professional experience (7 points) • 5 to 7 years of professional experience (5 points) • 2 to 4 years of professional experience (3 points)	
	<i>2.4.2 Education Qualification (Max: 5 points)</i> • Bachelor's degree (5 points)	

	• Certifications or Trainings (3 points)	
	<i>2.4.3 Prior engagements in handling campaigns, producing videos, and managing events, or other related projects projects over the past 10 years (Max: 5 points)</i> • 10 to 20 completed relevant projects (5 points) • 5 to 10 completed relevant projects (3 points)	
	2.5 Copywriter/Writer	
	<i>2.5.1 Professional Experience (Max: 10 points)</i> • More than 10 years of professional experience (10 points) • 8 to 10 years of professional experience (7 points) • 5 to 7 years of professional experience (5 points) • 2 to 4 years of professional experience (3 points)	
	<i>2.5.2 Education Qualification (Max: 5 points)</i> • Bachelor's degree (5 points) • Certifications or Trainings (3 points)	
	<i>2.5.3 Prior engagements in handling campaigns, producing videos, and managing events, or other related projects projects over the past 10 years (Max: 5 points)</i> • 10 to 20 completed relevant projects (5 points) • 5 to 10 completed relevant projects (3 points) • 1 to 5 completed relevant projects (1 point)	
	2.6 Production Coordinator/Assistant	
	<i>2.6.1 Professional Experience (Max: 10 points)</i> • More than 10 years of professional experience (10 points)	

	• 8 to 10 years of professional experience (7 points) • 5 to 7 years of professional experience (5 points) • 2 to 4 years of professional experience (3 points)	
	2.6.2 Education Qualification (Max: 5 points) • Bachelor's degree (5 points) • Certifications or Trainings (3 points)	
	2.6.3 Prior engagements in handling campaigns, producing videos, and managing events, or other related projects over the past 10 years (Max: 5 points) • 10 to 20 completed relevant projects (5 points) • 5 to 10 completed relevant projects (3 points) • 1 to 5 completed relevant projects (1 point)	
3	Current workload of the personnel relative to capacity	20
	3.1 Satisfactory performance on completed projects (Max: 10 points) • Complete certificate of satisfactory performance by previous client or any equivalent document (10 points) • 75% of projects with certificate of satisfactory performance by previous client or any equivalent document (7 points) • 50% of projects with certificate of satisfactory performance by previous client or any equivalent document (5 points) • Less than 50% of projects with certificate of satisfactory performance by previous client or any equivalent document (3 points)	
	3.2 Overall Work Commitment (Max: 10 points) • Higher than 1.5 ratio (number of consultants divide	

	ongoing projects) <i>(10 points)</i> - Between 1.0 and 1.5 ratio (number of consultants divide ongoing projects) <i>(7 points)</i> - Between 0.5 and 1.0 ratio (number of consultants divide ongoing projects) <i>(5 points)</i> - Lower than 0.5 ratio (number of consultants divide ongoing projects) <i>(3 points)</i> *Note: Current Workload Relative to Capacity pertains to the ratio between one (1) proposed key personnel to the current number of projects he/she is handling	
	TOTAL SCORE	100%

XII. CRITERIA FOR EVALUATION OF SHORTLISTED BIDDERS

The technical and financial proposals of the shortlisted bidders will be evaluated through Quality Cost-Based Evaluation (QCBE), based on the following criteria:

No.	Evaluation Criteria	Minimum Score
TECHNICAL PROPOSAL (85%)		
1	Experience and Capability of the Consultant	30
	A. Reputable consultant with demonstrated history of successful projects both in government and top corporations (Max: 15 points) - Handled more than 30 related projects in the last 10 years <i>(30 points)</i> - Handled more than 25 related projects in the last 10 years <i>(25 points)</i> - Handled more than 20 related projects in the last 10 years <i>(20 points)</i> - Handled more than 15 related projects in the	

	last 10 years <i>(15 points)</i> - Handled less than 10 related projects in the last 10 years <i>(10 points)</i> - Handled less than 5 related projects in the last 10 years <i>(5 points)</i> B. Received local or international awards related to communications or marketing from a reputable institution (Max: 5 points) - More than 10 awards <i>(5 points)</i> 9 to 10 awards <i>(4 points)</i> 6 to 8 awards <i>(3 points)</i> 3 to 5 awards <i>(2 points)</i> 1 to 2 awards <i>(1 point)</i> C. Active and prior engagements over the last five years in handling campaigns, producing videos, managing events, or other related projects (Max: 10 points) - More than 10 active and/or completed <i>(10 points)</i> 6 to 10 active and/or completed relevant projects <i>(8 points)</i> 3 to 5 active and/or completed relevant projects <i>(5 points)</i> 1 to 2 active and/or completed relevant projects <i>(3 points)</i>	
2	Qualification of key personnel	15

	A. Professional Experience (Max: 10 points) <i>a. Communication Strategist</i> • More than 10 years of professional experience <i>(10 points)</i> • 8 to 10 years of professional experience <i>(7 points)</i> • 5 to 7 years of professional experience <i>(5 points)</i> • 2 to 4 years of professional experience <i>(3 points)</i> <i>b. Creative Director</i> • More than 10 years of professional experience <i>(10 points)</i> • 8 to 10 years of professional experience <i>(7 points)</i> • 5 to 7 years of professional experience <i>(5 points)</i> • 2 to 4 years of professional experience <i>(3 points)</i> <i>c. Videographer/Photographer</i> • More than 10 years of professional experience <i>(10 points)</i> • 8 to 10 years of professional experience <i>(7 points)</i> • 5 to 7 years of professional experience <i>(5 points)</i> • 2 to 4 years of professional experience <i>(3 points)</i> <i>d. Video Editor</i> • More than 10 years of professional experience <i>(10 points)</i> • 8 to 10 years of professional	
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	experience (7 points) • 5 to 7 years of professional experience (5 points) • 2 to 4 years of professional experience (3 points) <i>e. Copywriter/writer</i> • More than 10 years of professional experience (10 points) • 8 to 10 years of professional experience (7 points) • 5 to 7 years of professional experience (5 points) • 2 to 4 years of professional experience (3 points) <i>f. Production Coordinator/Assistant</i> • More than 10 years of professional experience (10 points) • 8 to 10 years of professional experience (7 points) • 5 to 7 years of professional experience (5 points) • 2 to 4 years of professional experience (3 points)	
	B. Education (Max: 5 points) <i>a. Communication Strategist</i> • Master's degree (5 points) • Bachelor's degree (3 points) • Appropriate vocational certificate (2 points) <i>b. Creative Director</i>	

	• Master's degree (5 points) • Bachelor's degree (3 points) • Appropriate vocational certificate (2 points) c. Videographer/Photographer • Bachelor's degree (5 points) • Appropriate vocational certificate (3 points) d. Video Editor • Bachelor's degree (5 points) • Appropriate vocational certificate (3 points) e. Copywriter/Writer • Bachelor's degree (5 points) • Appropriate vocational certificate (3 points) f. Production Coordinator/Assistant • Bachelor's degree (5 points) • Appropriate vocational certificate (3 points)	
3	Plan of Approach and Project Methodology	40
	A. Concept Idea and Communication Plan (Max: 10 points) • Sample Project Plan with creative theme and corresponding Communication Plan B. Production of IEC Materials (Max: 10 points) • Mockups of art cards, infographics, reels, and other appropriate communication materials C. Event Production and Management (Max: 20 points) • Sample floor plan and venue layout • Sample venue design • Manpower assignments	

	• Catering • Tokens, Plaque, Trophy	
Financial Proposal (15%)		
1	A. Clarity and Completeness of the Financial Breakdown (Max: 15 points)	15
TOTAL SCORE		100

XIII. OWNERSHIP OF WORK

The thematic concepts, key visuals, photographs, videos, and other publication materials including roll up banner, podium, and other marketing collaterals prepared and produced by the Consultant shall belong to and remain as property of the Commission. The Consultant may retain copies of such materials for record purposes and submission for local and international awards only.

XIV. CONFIDENTIALITY CLAUSE

The Consultant warrants the full confidentiality of all information given by the Commission and/or gathered in relation to the fulfillment of the required services during the course of the engagement. The Consultant shall not disclose such information and shall return all materials, data, and other related documents to the Commission after the completion of the contract.

Furthermore, the Consultant shall not be engaged by any person or entity whose business or interests are against the interests of the Commission, including corporations with pending cases before the Commission. This prohibition shall subsist for a period of one (1) year after the expiration of the contract.

For this purpose, the Consultant shall enter into a Non-Disclosure Agreement with the Commission.

XV. TERMINATION OF THE CONTRACT

Either the Commission or the Consultant may terminate the engagement if either party commits a breach of any of the conditions of the contract and fails to remedy the same within thirty (30) days from receipt of a written demand from the concerned party for explanation and immediate rectification. In any case, a thirty (30)-day prior, written notice must be given to the concerned party.

The failure of either party to perform its obligation under this engagement shall not subject the party to any liability if such failure is caused or is occasioned by an event

of *force majeure*, including but not limited to an act of God such as fire, explosion, flood, drought and earthquake; war, hostility, invasion, act of foreign enemies, mobilization, requisition or embargo; rebellion, revolution, insurrection, or civil war; riot, commotion, strike or any other labor unrest; and an act or threat of terrorism.

SUMMARY OF TEAM COMPOSITION AND TASKS

TEAM LEADERS			
No.	Name	Position	Tasks/s
1		Communication Strategist	
2		Creative Director	
3		Videographer/Photographer	
4		Video Editor	
5		Copywriter/Writer	
6		Production Coordinator/Assistant	

TEAM MEMBERS			
No.	Name	Position	Tasks/s
1			
2			
3			
4			
5			
6			

**Add more rows if needed*

Signature: _____

Name and Title of Authorized Signatory: _____

Name of Consultant: _____