

PHILIPPINE BIDDING DOCUMENTS



Republic of the Philippines

PROCUREMENT OF CONSULTANCY SERVICES FOR THE SEC 90TH ANNIVERSARY ACTIVITIES

**First Edition
May 2025**



Procurement of CONSULTING SERVICES

**PROCUREMENT OF CONSULTANCY
SERVICES FOR THE SEC 90TH ANNIVERSARY
ACTIVITIES**

COMPETITIVE BIDDING NO. 2026-20

TABLE OF CONTENTS

Glossary of Acronyms, Terms, and Abbreviations.....	4
Definition of Terms	5
Part I.....	7
Section I. Request for Expression of Interest.....	8
Section II. Short-Listing Documents	11
Section III. Short-listing Data Sheet	17

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

REQUEST FOR EXPRESSION OF INTEREST FOR THE PROCUREMENT OF CONSULTANCY SERVICES FOR THE SEC 90TH ANNIVERSARY ACTIVITIES

- 1) The Securities and Exchange Commission (SEC), through the FY 2026 Annual Operating Budget of SEC, intends to apply the sum of **Four Million Seven Hundred Fifty-Two Thousand Pesos (Php 4,752,000.00)** being the Approved Budget for the Contract (ABC) to payments under the contract for **Procurement of Consultancy Services for the SEC 90th Anniversary Activities** under **Competitive Bidding No. 2026-020**. 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 Project. Short-listing documents of interested consultants must be duly received by the Bids and Awards Committee (BAC) Secretariat on or before **13 August 2026, 10:00 AM** at the Procurement Unit, Management Services Department, 7F 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 **August 6, 2026** and inspect the Bidding Documents at the address given below from 7:00AM to 4:00 PM.
- 4) A complete set of Bidding Documents may be acquired by interested Bidders on **August 6, 2026** from the given address below.

It may also be downloaded free of charge from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the website of the SEC.

- 5) 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, in case of one (1) or less than the required number apply for eligibility and short-listing, pass the eligibility check, and/or the minimum score required in the short-listing, the BAC shall consider the same who will be entitled to submit bids manually. The criteria and rating system for short-listing are:
 - a. Experience and Capability of the Firm (50%)
 - b. Qualifications of Key Personnel (20%)
 - c. Current Workload Relative to Capacity (30%)
- 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) The Procuring Entity shall evaluate bids to determine the Highest Rated Bid using the Quality-Cost Based Evaluation (QCBE). The Procuring Entity 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) 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**.
- 9) The contract shall be completed within the first week of December 2026.
- 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 SEC 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:

*Procurement Unit
Management Services Department
7F The SEC Headquarters, 7907 Makati Ave.
Salcedo Village, Bel-Air, Makati City
<https://www.sec.gov.ph>*

6 August 2026

(Sgd.) _____
OLIVER O. LEONARDO
*BAC Chairman for Goods (IT) and
Consulting Services*

Section II. Short-Listing Documents

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**.

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 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.
- d) *[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.

2.2 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 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.

2.3 Prospective bidders may obtain a full range of expertise by associating with individual consultant/s and/or other consultants or entities through a JV. Foreign Consultants shall seek the participation of Filipino Consultants by entering into a JV with Filipino Consultants.

2.4 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

Short-listing Data Sheet

Short-listing Documents	
1.2	The Consultant shall provide consulting services for event management, production, and implementation of the activities for the SEC 90th Anniversary celebration, in close coordination with the Human Resources Department (HRD) of the Commission. The engagement shall cover the conceptualization, planning, coordination, technical production, logistical management, and execution of major institutional events and commemorative initiatives in relation to the SEC's 90th Anniversary celebration.
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 ten (10) years prior to the deadline for the submission and receipt of short-listing documents.
2.1 (b) (vii)	The acceptable proof of satisfactory completion of completed contracts is a Certificate of Completion or Acceptance or valid proof of final payment issued by the client in case of completed contracts. Notice of Award or Notice to Proceed or signed Contracts issued by the client for on-going contracts and for contracts awarded but not yet started. Only contracts that are supported with proofs shall be considered for evaluation.
4.2	Each Bidder shall submit one (1) originally signed certified true copy of the original documents and electronic copy of first and second components of bids shall be submitted upon instructions of the BAC thru the BAC Secretariat at any time after the opening of bids. Bidders must arrange each bid document into sections with tabs properly labeled separating each document according to the provided checklist. Below is the list of short-listing documents: 1. Short-listing Documents Submission Form 2. PhilGEPS Certificate of Registration (Platinum Membership) in accordance with Section 20 of the IRR. 3. 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: • the name and location of the contract; • date of award of the contract; • type and brief description of Consulting Services; • consultant's role (whether main consultant, or partner in a JV) • amount of contract; • contract duration; and • certificate of satisfactory completion or equivalent specified in the SDS issued by the client, in the case of a completed contract. 4. 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. 5. 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, if applicable.
4.3 (c)	Bids and Awards Committee for Goods (IT) and Consulting Services The SEC Headquarters, 7907 Makati Ave., Salcedo Village Bel-Air, Makati City
4.3 (d)	Procurement of Consulting Services for the SEC 90th Anniversary Activities (Competitive Bidding No. 2026-21)
5	The address for submission of short-listing documents is: BIDS AND AWARDS COMMITTEE FOR GOODS (IT) AND CONSULTING SERVICES The SEC Headquarters, 7907 Makati Ave., Salcedo Village Bel-Air, Makati City The deadline for submission of short-listing documents is August 13, 2026, 10:00AM.
8.1	The place of opening of short-listing documents is MSD Conference Room, 7/F The SEC Headquarters, 7907 Makati Ave., Salcedo Village, Bel-Air, Makati City. The date and time of opening of short-listing documents is August 13, 2026, 10:15AM.
9.1	Similar contracts shall refer to <i>any contract for events management</i>.
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: i. Experience and capability of the firm (50%) ii. Qualification of key personnel (20%) iii. Current workload of the personnel relative to capacity (30%) 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

[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

CURRICULUM VITAE (CV) FOR PROPOSED KEY PROFESSIONAL STAFF

Proposed Position:			Please check:		
			☐ Key Personnel		☐ Team Member
Personal Information					
Name: (Last Name, First Name, Middle Name)					
Address			Contact No.	Email Address	
Date of Birth			Citizenship	Civil Status	
Work Experience <i>(start from the current employment)</i>					
Company Name	Inclusive Dates		Total (Years, Months)	Position Title	Actual Duties and Responsibilities (specify if L&D, HR or OD-related)
	From	To			
Current Workload <i>(include workload or projects form other companies, if any)</i>					
Company Name	Inclusive Dates		Total (Years, Months)	Position Title	Actual Duties and Responsibilities
	From	To			
Relevant Training <i>(within the last 10 years, start from the most recent)</i>					
Course Title	Inclusive Dates		Location	No. of Hours	Conducted / Sponsored by
	From	To			

Education <i>(start from the most recent)</i>					
School	Inclusive Dates		Degree Course	Scholarships / Academic Honors Received	
	From	To			
Certificates, Other Credentials					
Title			Date Received		

Certification:

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

Signature

Date: _____

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 Consulting Services for the SEC 90th Anniversary Activities (Competitive Bidding No. 2026-20), 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:

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

Name of ALL Proposed Personnel	Proposed Position	Job Status*	Job Status*	Proof of Identification

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: _____

Statement of All Ongoing and Completed Government and Private Contracts¹

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 (Indicate if Similar or Not to the Project)	Consultant's Role (Main Consultant/ Subconsultant/ Partner in a JV)	Amount of Contract	Project Duration (Start Date – Completion Date)	Proof of Satisfactory Completion of Completed Contracts (indicate N/A for Ongoing Contracts)
Completed Contracts						
<u>Government</u>						
<u>Private</u>						
Ongoing Contracts						
<u>Government</u>						
<u>Private</u>						

Submitted by : _____

(Printed Name and Signature)

Designation : _____

Date : _____

¹Including 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

