

**PHILIPPINE ECONOMIC ZONE AUTHORITY**

**Procurement of  
Certifying Body  
Services for the PEZA  
QMS Re-certification  
(PEZA-HO-2023-07)**

**Government of the Republic of the Philippines**

**(2023)**

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# *Glossary of Acronyms, Terms, and Abbreviations*

**ABC** – Approved Budget for the Contract.

**BAC** – Bids and Awards Committee.

**Bid** – A signed offer or proposal to undertake a contract submitted by a bidder in response to and in consonance with the requirements of the bidding documents. Also referred to as *Proposal* and *Tender*. (2016 revised IRR, Section 5[c])

**Bidder** – Refers to a contractor, manufacturer, supplier, distributor and/or consultant who submits a bid in response to the requirements of the Bidding Documents. (2016 revised IRR, Section 5[d])

**Bidding Documents** – The documents issued by the Procuring Entity as the bases for bids, furnishing all information necessary for a prospective bidder to prepare a bid for the Goods, Infrastructure Projects, and/or Consulting Services required by the Procuring Entity. (2016 revised IRR, Section 5[e])

**BIR** – Bureau of Internal Revenue.

**BSP** – Bangko Sentral ng Pilipinas.

**Consulting Services** – Refer to services for Infrastructure Projects and other types of projects or activities of the GOP requiring adequate external technical and professional expertise that are beyond the capability and/or capacity of the GOP 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. (2016 revised IRR, Section 5[i])

**CDA** - Cooperative Development Authority.

**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.

**CIF** – Cost Insurance and Freight.

**CIP** – Carriage and Insurance Paid.

**CPI** – Consumer Price Index.

**DDP** – Refers to the quoted price of the Goods, which means “delivered duty paid.”

**DTI** – Department of Trade and Industry.

**EXW** – Ex works.

**FCA** – “Free Carrier” shipping point.

**FOB** – “Free on Board” shipping point.

**Foreign-funded Procurement or Foreign-Assisted Project**– Refers to procurement whose funding source is from a foreign government, foreign or international financing institution as specified in the Treaty or International or Executive Agreement. (2016 revised IRR, Section 5[b]).

**Framework Agreement** – Refers to a written agreement between a procuring entity and a supplier or service provider that identifies the terms and conditions, under which specific purchases, otherwise known as “Call-Offs,” are made for the duration of the agreement. It is in the nature of an option contract between the procuring entity and the bidder(s) granting the procuring entity the option to either place an order for any of the goods or services identified in the Framework Agreement List or not buy at all, within a minimum period of one (1) year to a maximum period of three (3) years. (GPPB Resolution No. 27-2019)

**GFI** – Government Financial Institution.

**GOCC** – Government-owned and/or –controlled corporation.

**Goods** – Refer to all items, supplies, materials and general support services, except Consulting Services and Infrastructure Projects, which may be needed in the transaction of public businesses or in the pursuit of any government undertaking, project or activity, whether in the nature of equipment, furniture, stationery, materials for construction, or personal property of any kind, including non-personal or contractual services such as the repair and maintenance of equipment and furniture, as well as trucking, hauling, janitorial, security, and related or analogous services, as well as procurement of materials and supplies provided by the Procuring Entity for such services. The term “related” or “analogous services” shall include, but is not limited to, lease or purchase of office space, media advertisements, health maintenance services, and other services essential to the operation of the Procuring Entity. (2016 revised IRR, Section 5[r])

**GOP** – Government of the Philippines.

**GPPB** – Government Procurement Policy Board.

**INCOTERMS** – International Commercial Terms.

**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*. (2016 revised IRR, Section 5[u])

**LGUs** – Local Government Units.

**NFCC** – Net Financial Contracting Capacity.

**NGA** – National Government Agency.

**PhilGEPS** - Philippine Government Electronic Procurement System.

**Procurement Project** – refers to a specific or identified procurement covering goods, infrastructure project 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. (GPPB Circular No. 06-2019 dated 17 July 2019)

**PSA** – Philippine Statistics Authority.

**SEC** – Securities and Exchange Commission.

**SLCC** – Single Largest Completed Contract.

**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. (Item 3.8 of GPPB Resolution No. 13-2019, dated 23 May 2019). Supplier as used in these Bidding Documents may likewise refer to a distributor, manufacturer, contractor, or consultant.

**UN** – United Nations.

# *Section I. Invitation to Bid*

## INVITATION TO BID

### PROCUREMENT OF CERTIFYING BODY SERVICES FOR THE PEZA QMS RE-CERTIFICATION UNDER ISO 9001:2015 (PEZA-HO-2023-07)

1. The **Philippine Economic Zone Authority (PEZA)** through the Corporate Budget for the Year 2023 intends to apply the sum of **Three Million and Two Hundred Thousand Pesos (₱3,200,000.00)** being the ABC to payments under the contract for the Procurement of Certifying Body Services for the PEZA QMS Re-Certification under ISO 9001:2015 (PEZA-HO-2023-07). Bids received in excess of the ABC shall be automatically rejected at bid opening.
2. The PEZA now invites bids for the above Procurement Project. Delivery of the Services is required for a period of three (3) years. Bidders should have completed, within three (3) years from the date of submission and receipt of bids, a contract similar to the Project. The description of an eligible bidder is contained in the Bidding Documents, particularly, in Section II (Instructions to Bidders).
3. Bidding will be conducted through open competitive bidding procedures using a non-discretionary “*pass/fail*” criterion as specified in the 2016 revised Implementing Rules and Regulations (IRR) of Republic Act (RA) No. 9184.
  - a. Bidding is restricted to Filipino citizens/sole proprietorships, partnerships, or organizations with at least sixty percent (60%) interest or outstanding capital stock belonging to citizens of the Philippines, and to citizens or organizations of a country the laws or regulations of which grant similar rights or privileges to Filipino citizens, pursuant to RA No. 5183.
4. Prospective Bidders may obtain further information from PEZA and inspect the Bidding Documents at the address given below during from 9:00a.m. to 4:00p.m.
5. A complete set of Bidding Documents may be acquired by interested Bidders on **24 August 2023** from the given address and website(s) below [www.peza.gov.ph](http://www.peza.gov.ph) and upon payment of the applicable fee for the Bidding Documents, pursuant to the latest Guidelines issued by the GPPB, in the amount of Five Thousand Pesos Only (₱5,000.00) The Procuring Entity shall allow the bidder to present its proof of payment for the fees.
6. The Philippine Economic Zone Authority will hold a Pre-Bid Conference on **01 September 2023, 9:00 AM** at **8th Floor, Double Dragon Center West Building, DD Meridian Park, Macapagal Avenue, Pasay City** and/or **through video conferencing or webcasting via Microsoft Teams**, which shall be open to prospective bidders.

7. Interested bidders shall inform the PEZA-BAC, through its Secretariat, by sending an email at **bacsec@peza.gov.ph**, of their intention to participate in the Pre-Bid Conference at least one (1) day prior to the date of the conference.
8. Hard copies and soft copies of bids (1 original, 1 copy and a soft copy in USB) must be duly received by the BAC Secretariat through manual submission at the office address indicated below, on or before **13 September 2023, 9:00 AM**. Late bids shall not be accepted.
9. All Bids must be accompanied by a bid security in any of the acceptable forms and in the amount stated in **ITB** Clause 14.
10. Bid opening shall be on **13 September, 10:00 AM** at the **8th Floor, Double Dragon Center West Building, DD Meridian Park, Macapagal Avenue, Pasay City** and through video conferencing or webcasting via Microsoft Teams to observe social distancing. Bids will be opened in the presence of the bidders' representatives who choose to attend the activity.

<b>Activity</b>	<b>Schedule</b>
Posting of Invitation to Bid	24 August 2023
Issuance and Availability of Bid Documents	24 August 2023 to 13 September 2023, 09:00 AM
Pre-Bid Conference	01 September 2023, 09:00 AM
Deadline for Submission of bids	13 September 2023, 09:00 AM
Opening of Bids	13 September 2023, 10:00 AM

11. The PEZA 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 Sections 35.6 and 41 of the 2016 revised IRR of RA No. 9184, without thereby incurring any liability to the affected bidder or bidders.

12. For further information, please refer to:

*Philippine Economic Zone Authority  
Bids and Awards Committee (BAC) Secretariat  
8th Floor, Double Dragon Center West Bldg., DD Meridian Park,  
Macapagal Avenue Pasay City  
Email: bacsec@peza.gov.ph  
Tel. No. 8551-3451 local 200  
www.peza.gov.ph*

13. You may visit the following websites: For downloading of Bidding Documents:  
*<http://www.peza.gov.ph/bid-opportunities>*

24 August 2023

(Sgd)  
**ANIDELLE JOY M. ALGUSO**  
BAC Chairperson

## ***Section II. Instructions to Bidders***

### **1. Scope of Bid**

The Procuring Entity, PEZA wishes to receive Bids for the Procurement of Certifying Body Services for the PEZA QMS Re-Certification under ISO 9001:2015 (PEZA-HO-2023-07).

The Procurement Project (referred to herein as “Project”) is composed of 1 lot, the details of which are described in Section VII (Technical Specifications).

### **2. Funding Information**

2.1. The GOP through the source of funding as indicated below for CY 2023 in the amount of Php 3,200,000.00.

2.2. The source of funding is:

a. GOCC and GFIs, the Corporate Operating Budget.

### **3. Bidding Requirements**

The Bidding for the Project shall be governed by all the provisions of RA No. 9184 and its 2016 revised IRR, including its Generic Procurement Manuals and associated policies, rules and regulations as the primary source thereof, while the herein clauses shall serve as the secondary source thereof.

Any amendments made to the IRR and other GPPB issuances shall be applicable only to the ongoing posting, advertisement, or **IB** by the BAC through the issuance of a supplemental or bid bulletin.

The Bidder, by the act of submitting its Bid, shall be deemed to have verified and accepted the general requirements of this Project, including other factors that may affect the cost, duration and execution or implementation of the contract, project, or work and examine all instructions, forms, terms, and project requirements in the Bidding Documents.

### **4. Corrupt, Fraudulent, Collusive, and Coercive Practices**

The Procuring Entity, as well as the Bidders and Suppliers, shall observe the highest standard of ethics during the procurement and execution of the contract. They or through an agent shall not engage in corrupt, fraudulent, collusive, coercive, and obstructive practices defined under Annex “I” of the 2016 revised IRR of RA No. 9184 or other integrity violations in competing for the Project.

### **5. Eligible Bidders**

5.1. Only Bids of Bidders found to be legally, technically, and financially capable will be evaluated.



- 5.2. Foreign ownership limited to those allowed under the rules may participate in this Project.
- 5.3. Pursuant to Section 23.4.1.3 of the 2016 revised IRR of RA No.9184, the Bidder shall have an SLCC that is at least one (1) contract similar to the Project the value of which, adjusted to current prices using the PSA's CPI, must be at least equivalent to:
  - a. The Bidder must have completed a single contract that is similar to this Project, equivalent to at least fifty percent (50%) of the ABC.
- 5.4. The Bidders shall comply with the eligibility criteria under Section 23.4.1 of the 2016 IRR of RA No. 9184.

## **6. Origin of Goods**

There is no restriction on the origin of goods other than those prohibited by a decision of the UN Security Council taken under Chapter VII of the Charter of the UN, subject to Domestic Preference requirements under **ITB** Clause 18.

## **7. Subcontracts**

- 7.1. The Bidder may subcontract portions of the Project to the extent allowed by the Procuring Entity as stated herein, but in no case more than twenty percent (20%) of the Project.

The Procuring Entity has prescribed that:

- a. Subcontracting is not allowed.

## **8. Pre-Bid Conference**

The Procuring Entity will hold a pre-bid conference for this Project on 01 September 2023, 09:00am, as indicated in paragraph 6 of the **IB**.

## **9. Clarification and Amendment of Bidding Documents**

Prospective bidders may request for clarification on and/or interpretation of any part of the Bidding Documents. Such requests must be in writing and received by the Procuring Entity, either at its given address or through electronic mail indicated in the **IB**, at least ten (10) calendar days before the deadline set for the submission and receipt of Bids.

## **10. Documents comprising the Bid: Eligibility and Technical Components**

- 10.1. The first envelope shall contain the eligibility and technical documents of the Bid as specified in **Section VIII (Checklist of Technical and Financial Documents)**.

- 10.2. The Bidder's SLCC as indicated in **ITB** Clause 5.3 should have been completed within three (3) years prior to the deadline for the submission and receipt of bids.
- 10.3. If the eligibility requirements or statements, the bids, and all other documents for submission to the BAC are in foreign language other than English, it must be accompanied by a translation in English, which shall be authenticated by the appropriate Philippine foreign service establishment, post, or the equivalent office having jurisdiction over the foreign bidder's affairs in the Philippines. Similar to the required authentication above, for Contracting Parties to the Apostille Convention, only the translated documents shall be authenticated through an apostille pursuant to GPPB Resolution No. 13-2019 dated 23 May 2019. The English translation shall govern, for purposes of interpretation of the bid.

## **11. Documents comprising the Bid: Financial Component**

- 11.1. The second bid envelope shall contain the financial documents for the Bid as specified in **Section VIII (Checklist of Technical and Financial Documents)**.
- 11.2. If the Bidder claims preference as a Domestic Bidder or Domestic Entity, a certification issued by DTI shall be provided by the Bidder in accordance with Section 43.1.3 of the 2016 revised IRR of RA No. 9184.
- 11.3. Any bid exceeding the ABC indicated in paragraph 1 of the **IB** shall not be accepted.

## **12. Bid Prices**

- 12.1. Prices indicated on the Price Schedule shall be entered separately in the following manner:
  - a. For Goods offered from within the Procuring Entity's country:
    - i. The price of the Goods quoted EXW (ex-works, ex-factory, ex-warehouse, ex-showroom, or off-the-shelf, as applicable);
    - ii. The cost of all customs duties and sales and other taxes already paid or payable;
    - iii. The cost of transportation, insurance, and other costs incidental to delivery of the Goods to their final destination; and
    - iv. The price of other (incidental) services, if any, listed in the **BDS**.
  - b. For Goods offered from abroad:
    - i. Unless otherwise stated in the **BDS**, the price of the Goods shall be quoted delivered duty paid (DDP) with the place of destination in the Philippines as specified in the **BDS**. In quoting the price,

the Bidder shall be free to use transportation through carriers registered in any eligible country. Similarly, the Bidder may obtain insurance services from any eligible source country.

- ii. The price of other (incidental) services, if any, as listed in the **BDS**.

### **13. Bid and Payment Currencies**

- 13.1. For Goods that the Bidder will supply from outside the Philippines, the bid prices may be quoted in the local currency or tradeable currency accepted by the BSP at the discretion of the Bidder. However, for purposes of bid evaluation, Bids denominated in foreign currencies, shall be converted to Philippine currency based on the exchange rate as published in the BSP reference rate bulletin on the day of the bid opening.
- 13.2. Payment of the contract price shall be made in:
  - a. Philippine Pesos.

### **14. Bid Security**

- 14.1. The Bidder shall submit a Bid Securing Declaration or any form of Bid Security in the amount indicated in the **BDS**, which shall be not less than the percentage of the ABC in accordance with the schedule in the **BDS**.
- 14.2. The Bid and bid security shall be valid for 120 calendar days reckoned from the bid opening date. Any Bid not accompanied by an acceptable bid security shall be rejected by the Procuring Entity as non-responsive.

### **15. Sealing and Marking of Bids**

Each Bidder shall submit one copy of the first and second components of its Bid.

The Procuring Entity may request additional hard copies and/or electronic copies of the Bid. However, failure of the Bidders to comply with the said request shall not be a ground for disqualification.

If the Procuring Entity allows the submission of bids through online submission or any other electronic means, the Bidder shall submit an electronic copy of its Bid, which must be digitally signed. An electronic copy that cannot be opened or is corrupted shall be considered non-responsive and, thus, automatically disqualified.

### **16. Deadline for Submission of Bids**

- 16.1. The Bidders shall submit on the specified date and time and either at its physical address or through online submission as indicated in paragraph 7 of the **IB**.

## 17. Opening and Preliminary Examination of Bids

- 17.1. The BAC shall open the Bids in public at the time, on the date, and at the place specified in paragraph 9 of the **IB**. The Bidders' representatives who are present shall sign a register evidencing their attendance. In case videoconferencing, webcasting or other similar technologies will be used, attendance of participants shall likewise be recorded by the BAC Secretariat.

In case the Bids cannot be opened as scheduled due to justifiable reasons, the rescheduling requirements under Section 29 of the 2016 revised IRR of RA No. 9184 shall prevail.

- 17.2. The preliminary examination of bids shall be governed by Section 30 of the 2016 revised IRR of RA No. 9184.

## 18. Domestic Preference

- 18.1. The Procuring Entity will grant a margin of preference for the purpose of comparison of Bids in accordance with Section 43.1.2 of the 2016 revised IRR of RA No. 9184.

## 19. Detailed Evaluation and Comparison of Bids

- 19.1. The Procuring Entity's BAC shall immediately conduct a detailed evaluation of all Bids rated "*passed*," using non-discretionary pass/fail criteria. The BAC shall consider the conditions in the evaluation of Bids under Section 32.2 of the 2016 revised IRR of RA No. 9184.

- 19.2. If the Project allows partial bids, bidders may submit a proposal on any of the lots or items, and evaluation will be undertaken on a per lot or item basis, as the case maybe. In this case, the Bid Security as required by **ITB** Clause 14 shall be submitted for each lot or item separately.

- 19.3. The descriptions of the lots or items shall be indicated in **Section VII (Technical Specifications)**, although the ABCs of these lots or items are indicated in the **BDS** for purposes of the NFCC computation pursuant to Section 23.4.2.6 of the 2016 revised IRR of RA No. 9184. The NFCC must be sufficient for the total of the ABCs for all the lots or items participated in by the prospective Bidder.

- 19.4. The Project shall be awarded as follows:

One Project having several items that shall be awarded as one contract.

- 19.5. Except for bidders submitting a committed Line of Credit from a Universal or Commercial Bank in lieu of its NFCC computation, all Bids must include the NFCC computation pursuant to Section 23.4.1.4 of the 2016 revised IRR of RA No. 9184, which must be sufficient for the total of the ABCs for all the lots or items participated in by the prospective Bidder. For bidders submitting the

committed Line of Credit, it must be at least equal to ten percent (10%) of the ABCs for all the lots or items participated in by the prospective Bidder.

## **20. Post-Qualification**

- 20.2. Within a non-extendible period of five (5) calendar days from receipt by the Bidder of the notice from the BAC that it submitted the Lowest Calculated Bid, the Bidder shall submit its latest income and business tax returns filed and paid through the BIR Electronic Filing and Payment System (eFPS) and other appropriate licenses and permits required by law and stated in the **BDS**.

## **21. Signing of the Contract**

- 21.1. The documents required in Section 37.2 of the 2016 revised IRR of RA No. 9184 shall form part of the Contract. Additional Contract documents are indicated in the **BDS**.

## *Section III. Bid Data Sheet*

### **Bid Data Sheet**

<b>ITB Clause</b>	
5.3	For this purpose, contracts similar to the Project shall be:  a. <i>Services on QMS Re-certification under ISO 9001:2015 contracts.</i>  b. completed within three (3) years prior to the deadline for the submission and receipt of bids.
7.1	<i>Subcontracting is not allowed.</i>
12	No further instructions.
14.1	The bid security shall be in the form of a Bid Securing Declaration, or any of the following forms and amounts:  a. The amount of not less than Php 64,000.00, if bid security is in cash, cashier's/manager's check, bank draft/guarantee or irrevocable letter of credit; or  b. The amount of not less than PhP 160,000.00, if bid security is in Surety Bond.
19.3	No further instructions.
20.2	No additional requirements.
21.2	No additional requirements.

## ***Section IV. General Conditions of Contract***

### **1. Scope of Contract**

This Contract shall include all such items, although not specifically mentioned, that can be reasonably inferred as being required for its completion as if such items were expressly mentioned herein. All the provisions of RA No. 9184 and its 2016 revised IRR, including the Generic Procurement Manual, and associated issuances, constitute the primary source for the terms and conditions of the Contract, and thus, applicable in contract implementation. Herein clauses shall serve as the secondary source for the terms and conditions of the Contract.

This is without prejudice to Sections 74.1 and 74.2 of the 2016 revised IRR of RA No. 9184 allowing the GPPB to amend the IRR, which shall be applied to all procurement activities, the advertisement, posting, or invitation of which were issued after the effectivity of the said amendment.

Additional requirements for the completion of this Contract shall be provided in the **Special Conditions of Contract (SCC)**.

### **2. Advance Payment and Terms of Payment**

2.1. Advance payment of the contract amount is provided under Annex “D” of the revised 2016 IRR of RA No. 9184.

2.2. The Procuring Entity is allowed to determine the terms of payment on the partial or staggered delivery of the Goods procured, provided such partial payment shall correspond to the value of the goods delivered and accepted in accordance with prevailing accounting and auditing rules and regulations. The terms of payment are indicated in the **SCC**.

### **3. Performance Security**

Within ten (10) calendar days from receipt of the Notice of Award by the Bidder from the Procuring Entity but in no case later than the signing of the Contract by both parties, the successful Bidder shall furnish the performance security in any of the forms prescribed in Section 39 of the 2016 revised IRR of RA No. 9184. *In the case of Framework Agreement*, the Bidder may opt to furnish the performance security or a Performance Securing Declaration as defined under the Guidelines on the Use of Framework Agreement.

### **4. Inspection and Tests**

The Procuring Entity or its representative shall have the right to inspect and/or to test the Goods to confirm their conformity to the Project. In addition to tests in the **SCC**, **Section VII (Technical Specifications)** shall specify what inspections and/or tests the Procuring Entity requires, and where they are to be conducted. The Procuring Entity

shall notify the Supplier in writing, in a timely manner, of the identity of any representatives retained for these purposes.

All reasonable facilities and assistance for the inspection and testing of Goods, including access to drawings and production data, shall be provided by the Supplier to the authorized inspectors at no charge to the Procuring Entity.

## **5. Warranty**

5.1 In order to assure that manufacturing defects shall be corrected by the Supplier, a warranty shall be required from the Supplier as provided under Section 62.1 of the 2016 revised IRR of RA No. 9184.

5.2 The Procuring Entity shall promptly notify the Supplier in writing of any claims arising under this warranty. Upon receipt of such notice, the Supplier shall, repair or replace the defective Goods or parts thereof without cost to the Procuring Entity, pursuant to the Generic Procurement Manual.

## **6. Liability of the Supplier**

The Supplier's liability under this Contract shall be as provided by the laws of the Republic of the Philippines.

If the Supplier is a joint venture, all partners to the joint venture shall be jointly and severally liable to the Procuring Entity.



## *Section V. Special Conditions of Contract*

<b>GCC Clause</b>	
1	<i>No additional requirements.</i>
2.2	<p>The terms of payment shall be as follows:            Payments shall be based on the completion of the following activities as evidenced by the submission by the CB and acceptance of PEZA of the required deliverables at the end/completion of the following phases:</p> <ul style="list-style-type: none"> <li>1.1 Conduct of Recertification Audit, including submission of audit report and issuance of ISO 9001:2015 certificate (valid for 3 years);</li> <li>1.2 Conduct of 1<sup>st</sup> Surveillance Audit including submission of audit report; and,</li> <li>1.3 Conduct of 2<sup>nd</sup> Surveillance Audit including submission of audit report.</li> </ul>
4	<i>No additional requirements.</i>

## *Section VI. Schedule of Requirements*

The delivery schedule stipulates hereafter the date of delivery to the project site.

<b>Item Number</b>	<b>Description</b>	<b>Quantity</b>	<b>Total</b>	<b>Delivered, Weeks/Months</b>
<b>1 LOT</b>	Procurement of Certifying Body Services for the PEZA QMS Re-Certification under ISO 9001:2015	1	1	Re-certification Audit for 2023 completed at least sixty (60) days prior to the expiration of the existing ISO certification <i>(December 27, 2023)</i>  Surveillance Audit for year 2024 to be completed on or before the 15th of November 2024  Surveillance Audit for year 2025 to be completed on or before the 15th of November 2025

\* The period for the performance of the obligations under the Contract shall not be beyond the validity of the corresponding appropriations for the Project.

**I hereby certify to comply and deliver all the above requirements.**

\_\_\_\_\_  
**Name of Company/Bidder      Signature Over Printed Name of Representative      Date**

# *Section VII. Technical Specifications*

## **Technical Specifications**

*Bidders must state here either “Comply” or “Not Comply” against each of the individual parameters of each Specification stating the corresponding performance parameter.*

<b>Item</b>	<b>Technical Specifications</b>	<b>Statement of Compliance</b> (State whether “COMPLY” or “NOT COMPLY”)
<b>1 LOT</b>	<p><b>2.0 Project Title</b></p> <p>Engagement of a certifying body for re-certification to ISO 9001:2015 of the Philippine Economic Zone Authority covering all PEZA processes in all its economic zones nationwide.</p>	
	<p><b>3.0 Background</b></p> <p>The Philippine Economic Zone Authority, a government-owned and controlled corporation attached to the Department of Trade and Industry, is committed to contribute to the accelerated generation of investments, exports and employment in the Philippines through effective management of public and private economic zones, efficient administration of incentives, utmost delivery of services, focused investment promotions and proactive conduct of developmental activities.</p> <p>PEZA has instituted organization-wide programs in order to become more responsive, effective, efficient, competitive and innovative in upholding its commitments. As part of its ongoing initiatives, PEZA is implementing a Quality Management System (QMS) for all PEZA processes in all its sites to ensure the delivery of timely and efficient services to its clients.</p> <p>PEZA’s 3-year certification to ISO 9001:2000 was first awarded in 9 December 2008. This was upgraded to ISO 9001:2008 with extension of scope to include all processes and additional sites clustered into supervising offices in 01 March 2010.</p> <p>Considering that PEZA’s recent certification will now be expiring on 27 December 2023 and the organization wishes to continue the implementation of its QMS in conformance with ISO 9001 standards, there is a need to secure again the services of a Certifying Body (CB).</p>	
	<p><b>4.0 Objective</b></p> <p>To contract a certifying body competent and qualified to assess conformity to ISO 9001:2015 standards of the QMS being implemented by PEZA for all its processes in all PEZA sites based on the grouping of supervising offices.</p>	
	<p><b>5.0 Scope of Work / Deliverables</b></p> <p>The CB shall provide the following services:</p>	

	<p>5.1 Re-certification Audit for 2023 completed at least sixty (60) days prior to the expiration of the existing ISO certification, which includes but not limited to the following activities:</p> <p>5.1.1 Document review (as applicable);</p> <p>5.1.2 Prepare and submit recertification audit plan not later than two (2) weeks prior to recertification audit;</p> <p>5.1.3 Conduct recertification audit; and,</p> <p>5.1.4 Prepare and submit audit report detailing observations, opportunities for improvement, and any non-conformity to ISO 9001:2015 standards immediately after the completion of the on-site audit unless otherwise agreed upon by the two (2) parties.</p> <p>5.2 Issuance of ISO 9001:2015 certificates (free of charge) to all registered sites valid for three (3) years within one (1) month from date of PEZA’s receipt of the written recommendation for certification.</p> <p>5.3 Surveillance Audit for year 2024 to be completed on or before the 15th of November 2024, which includes but not limited to the following activities:</p> <p>5.3.1 Prepare and submit surveillance audit plan not later than two (2) weeks prior to the schedule of the surveillance audit;</p> <p>5.3.2 Conduct surveillance audit; and,</p> <p>5.3.3 Prepare and submit audit report detailing observations, opportunities for improvement and any non-conformity to ISO 9001:2015 standards immediately after the completion of the on-site audit unless otherwise agreed upon by the two (2) parties.</p> <p>5.4 Surveillance Audit for year 2025 to be completed on or before the 15th of November 2025, which includes but not limited to the following activities:</p> <p>5.4.1 Prepare and submit surveillance audit plan not later than two (2) weeks prior to the schedule of the surveillance audit;</p> <p>5.4.2 Conduct surveillance audit; and,</p> <p>5.4.3 Prepare and submit audit report detailing observations, opportunities for improvement and any non-conformity to ISO 9001:2015 standards immediately after the completion of the on-site audit unless otherwise agreed upon by the two (2) parties.</p> <p>5.5 The Re-certification and Surveillance Audits must include all supervising cluster (public economic zone) and private economic zone/s to represent each cluster. Attached is a list of PEZA supervising clusters and operating economic zones for reference.</p> <p>5.6 Provision of regular updates and assistance to new versions of, or, changes in ISO 9001:2015 standards.</p>	
<p><b>6.0</b></p>	<p><b>Project duration</b></p> <p>Three (3) years from 2023 to 2025.</p>	
<p><b>7.0</b></p>	<p><b>Selection criteria</b></p>	

7.1	The CB shall be accredited for ISO 9001: 2015 certification / conformity assessment activities by a national accreditation body recognized by the Philippine government, such as the Bureau of Product Standards (BPS) under the Department of Trade and Industry, to include the scope L75 (Public Administration and Defense; Compulsory Social Security).	
7.2	The CB shall provide PEZA with its company profile highlighting related projects, scope of work and implementation methodology. The curriculum vitae of the proposed audit team shall also be submitted to PEZA.	
7.3	The CB's scope of work shall indicate the number of auditors and man-days per site required for multi-sites for recertification and surveillance audits. Should sampling be used, it shall conform with the provisions of International Accreditation Forum Inc. (IAF) Mandatory Document for the Certification of Multiple Sites Based on Sampling.	
7.4	To avoid conflict of interest, a CB that has provided QMS consulting services or site-specific auditor training to a particular group / unit within PEZA within two years prior to the audit shall not qualify as CB for PEZA Note: Consulting refers to the provision of training on documentation development, or assistance in the implementation of QMS of a specific organization. Conduct of trainings that are open to the public, not organization-specific, and held in a public forum is not considered as consulting.	
7.5	The CB Audit Team shall satisfy the following: 7.5.1 Consist of qualified auditors to conduct audits in the name of the CB. The CB may use external experts as necessary; 7.5.2 Be composed of team members with actual hands-on experience / familiarity with auditing a service sector / government agency for at least one cycle (three years); 7.5.3 No member of the audit team has provided consultancy services for PEZA or who has been a former PEZA employee within two (2) years prior to the audit; 7.5.4 Different auditors shall be assigned for each subsequent surveillance audit. However, at least one auditor of the Audit Team shall participate in all audits of the three-year audit cycle; 7.5.5 Ensure Audit Team's consistency of interpretations of the ISO standards and audit observations or findings.	
7.6	The CB shall submit the following requirements: 7.6.1 Department of Trade and Industry (DTI) business name registration or Securities and Exchange Commission (SEC) registration certificate, whichever may be appropriate under existing laws of the Philippines; 7.6.2 Valid and current Mayor's permit / municipal license; 7.6.3 Tax Clearance; 7.6.4 PhilGEP's Registration Certificate; 7.6.5 Annual Income Tax Returns (VAT) filed via the BIR's EFPs;	

<p>7.6.6 Business Tax Returns (VAT) for the previous six (6) months prior to the submission of bids filed via the BIR’s EFPs; and,</p> <p>7.6.7 Curriculum Vitae of Auditors to be assigned to the project.</p> <p>7.7 The CB shall include in their audit activities a procedure for client appeals. If resolutions on good terms for disputes between PEZA and the CB cannot be made, PEZA shall be afforded the right to lodge appeals about the decisions of the audit team to an independent arbitrator. Independently from this, the legal path shall be open to both parties.</p> <p>7.8 All information reviewed and recorded by the CB Audit Team would be treated in the strictest confidence at all times.</p> <p>7.9 The CB shall adhere to the agreed scope of work / deliverables as approved by PEZA’s Bids and Awards Committee.</p> <p>7.10 The CB Audit Team shall abide with the auditing principles, terminologies and guidelines as specified in the ISO 19011:2018 – Guidelines for auditing management systems.</p>	
<p><b>8.0 Engagement fee</b></p> <p>Cost of engagement of the CB shall be based on the agreed contract between the two parties. Payments shall be based on the completion of the following activities as evidenced by the submission by the CB and acceptance of PEZA of the required deliverables at the end/completion of the following phases:</p> <p>8.1 Conduct of Recertification Audit, including submission of audit report and issuance of ISO 9001:2015 certificate (valid for 3 years);</p> <p>8.2 Conduct of 1st Surveillance Audit including submission of audit report; and,</p> <p>8.3 Conduct of 2nd Surveillance Audit including submission of audit report.</p>	
<p><b>9.0 Source of funds</b></p> <p>Proposed 2023 – 2025 Corporate Operating Budget with an Approved Budget for the Contract amounting to P 3, 200, 000.00 VAT inclusive and, inclusive of all other out-of-pocket / incidental expenses.</p>	
<p><b>10.0 Special provisions</b></p> <p>10.1 Travel and accommodation costs and food expenses of the CB Audit Team shall be for the account of the CB.</p> <p>10.2 During the contract implementation, the CB shall pay taxes in full and on time and failure to do so will entitle PEZA to suspend payment on the services delivered by the CB.</p> <p>The CB shall also present to PEZA, on a quarterly basis, a tax clearance from the Bureau of Internal Revenue as well as a copy of its income and business tax returns duly stamped and received by the BIR and duly validated with the tax payments made thereon.</p>	
<p>PEZA SCOPE OF CERTIFICATION (for re-certification)</p> <p>ALL PEZA PROCESSES IN ALL SPECIAL ECONOMIC ZONES (SEZs) &amp; INFORMATION TECHNOLOGY (IT) PARKS/CENTERS NATIONWIDE</p>	

(Business Registration/Permits, Zone Enterprise Operations, Incentives Administration, Zone Estate Administration and Administrative Services)

**PEZA SITES / ADDRESS TO BE CERTIFIED:**

<b>OFFICE</b>	<b>LOCATION</b>
Head Office	Doubledragon Center West Building, Dd Meridian Park, Macapagal Avenue, Pasay City
JPCO-NAIA	Pasay, Metro Manila
JPCO-MICT	Tondo, Manila
JPCO-South	Port Area, Manila
Cavite Economic Zone including Cluster 1 (PEZA Offices in Bulacan, Caloocan City, Calabarzon and Southern Luzon)	Rosario, Cavite, Region 4
Zone Office - NCR	Doubledragon Center West Building, Dd Meridian Park, Macapagal Avenue, Pasay City
North Gate Cyberzone	Muntinlupa, Metro Manila, NCR
Food Terminal Inc. SEZ	Taguig, Metro Manila, NCR
Amkor Technology SEZ	Muntinlupa, Metro Manila, NCR
Macro-Asia SEZ	Pasay, Metro Manila, NCR
Asahi Glass	Pasig, Metro Manila, NCR
Victoria Wave - Caloocan City	Caloocan, Metro Manila, NCR
Pilipinas Development Corporation IT Park	San Rafael, Bulacan, Region 3
First Philippine Industrial Park II - SEZ	Sto. Tomas, Batangas, Region 4
St. Frances Cabrini Medical Tourism Park	Sto. Tomas, Batangas, Region 4
Carmelray Industrial Park II (CIP2)	Calamba, Laguna, Region 4
YTMI Realty-Special Economic Zone	Calamba, Laguna, Region 4
First Philippine Industrial Park (FPIP)	Sto. Tomas, Batangas, Region 4
First Cavite Industrial Estate-SEZ	Dasmariñas, Cavite, Region 4
Daiichi Industrial Park - SEZ	Silang, Cavite, Region 4
Gateway Business Park (GBP)	General Trias, Cavite, Region 4
IT Centers / Parks in Imus / Bacoor	Imus, Cavite
Light Industry and Science Park of the Philippines III	Sto. Tomas, Batangas, Region 4
Light Industry and Science Park of the Philippines IV	Malvar, Batangas, Region 4
Golden Gate Business Park - SEZ	General Trias, Cavite, Region 4

Suntrust Ecotown Tanza	Tanza, Cavite, Region 4
Filinvest Technology Park - Calamba	Calamba, Laguna, Region 4
Laguna Technopark Annex (LTI Annex)	Biñan, Laguna, Region 4
IT Center/Parks in Sta. Rosa	Sta. Rosa, Laguna, Region 4
Greenfield Automotive Park	Sta. Rosa, Laguna, Region 4
People's Technology Complex-SEZ	Carmona, Cavite, Region 4
Laguna International Industrial Park	Biñan, Laguna, Region 4
Golden Mile Business Park	Carmona, Cavite, Region 4
People's Technology Complex-SEZ (PTC-SEZ)	Carmona, Cavite, Region 4
Lima Technology Center	Lipa, Batangas, Region 4
Sagara Metro Plastics SEZ	Calamba, Laguna, Region 4
Carmelray Industrial Park I	Calamba, Laguna, Region 4
Light Industry and Science Park of the Philippines	Cabuyao, Laguna, Region 4
Light Industry and Science Park of the Philippines II	Calamba, Laguna, Region 4
Keppel Philippine Marine SEZ (KPM-SEZ)	Bauan, Batangas, Region 4
Mactan Economic Zone including Cluster 2 (PEZA Offices in Visayas, Mindanao and Palawan)	Mactan, Cebu, Region 7
JPCO - Sub-Port of Mactan	Mactan, Cebu, Region 7
JPCO - Port of Cebu	Cebu City, Cebu
JPCO - Port of Palawan	Puerto Princesa, Palawan
Mindanao Container Terminal	Tagoloan, Misamis Oriental
Cebu Light Industrial Park (CLIP SEZ)	Mactan, Cebu, Region 7
New Cebu Township One (NCTO)	Naga, Cebu, Region 7
Dadc Economic Zone	Sta. Cruz, Davao Del Sur, REGION 11
Balo-I Agro Industrial EZ	Balo-I, Lanao Del Norte, Region 10
Jasaan Misamis Oriental EZ/Taganito Mining Corp SEZ	Jasaan, Misamis Oriental, Region 10
Taganito Hpal SEZ	Claver, Surigao Del Norte, Region 13
Mactan Economic Zone II	Mactan, Cebu, Region 7
Mitsumi Realty Inc. SEZ	Danao, Cebu, Region 7
Phividec Industrial Estate EZ	Villanueva, Misamis Oriental, Region 10
Leyte Industrial Development Estate LIDE-ISEPZ	Isabel, Leyte, Region 8
All Zones in South Cotabato	
Agrotex Gensan Economic Zone (AGEZ)	Gen. Santos, South Cotabato, Region 12



San Carlos SEZ	San Carlos City, Negros Occidental, Region 6	
Baguio City Economic Zone including Cluster 3 (PEZA Offices in Region 1, Northern and Central Luzon and Cordillera Administrative Region)	Baguio, Benguet, Car	
Sutherland IT Center	Baguio City	
Teco SEZ (Tipco Estates Corp.)	Mabalacat, Pampanga, Region 3	
JPCO-Clark	Angeles, Pampanga	
SM City Clark IT Park	Angeles, Pampanga, Region 3	
Luisita Industrial Park	San Miguel, Tarlac, Region 3	
North Luzon Aero Indl Park	Binalonan, Pangasinan, Region 1	
Subic Shipyard SEZ	Subic, Zambales, Region 3	
JPCO SBMA	Subic, Zambales	
Angeles Industrial Park-Special Economic Zone	Bacolor, Pampanga, Region 3	
Hermosa Ecozone Industrial Park	Hermosa, Bataan, Region 3	

## ***Section VIII. Checklist of Technical and Financial Documents***

### **Notes on the Checklist of Technical and Financial Documents**

The prescribed documents in the checklist are mandatory to be submitted in the Bid, but shall be subject to the following:

- a. GPPB Resolution No. 09-2020 on the efficient procurement measures during a State of Calamity or other similar issuances that shall allow the use of alternate documents in lieu of the mandated requirements; or
- b. Any subsequent GPPB issuances adjusting the documentary requirements after the effectivity of the adoption of the PBDs.

The BAC shall be checking the submitted documents of each Bidder against this checklist to ascertain if they are all present, using a non-discretionary “pass/fail” criterion pursuant to Section 30 of the 2016 revised IRR of RA No. 9184.

# Checklist of Technical and Financial Documents

## I. TECHNICAL COMPONENT ENVELOPE

### *Class “A” Documents*

#### Legal Documents

- (a) Valid PhilGEPS Registration Certificate (Platinum Membership) (all pages) **in accordance with Section 8.5.2 of the IRR;**

#### Technical Documents

- (b) Statement of the prospective bidder of all its ongoing government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid; **and**
- (c) Statement of the bidder’s Single Largest Completed Contract (SLCC) similar to the contract to be bid, except under conditions provided for in Sections 23.4.1.3 and 23.4.2.4 of the 2016 revised IRR of RA No. 9184, within the relevant period as provided in the Bidding Documents; **and**
- (d) Original copy of Bid Security. If in the form of a Surety Bond, submit also a certification issued by the Insurance Commission **or** Original copy of Notarized Bid Securing Declaration; **and**
- (e) Conformity with the Technical Specifications, which may include production/delivery schedule, manpower requirements, and/or after-sales/parts, if applicable; **and**
- (f) Original duly signed Omnibus Sworn Statement (OSS) **and** if applicable, Original Notarized Secretary’s Certificate in case of a corporation, partnership, or cooperative; or Original Special Power of Attorney of all members of the joint venture giving full power and authority to its officer to sign the OSS and do acts to represent the Bidder.

#### Financial Documents

- (g) The prospective bidder’s computation of Net Financial Contracting Capacity (NFCC) **or** A committed Line of Credit from a Universal or Commercial Bank in lieu of its NFCC computation.

### *Class “B” Documents*

- (h) If applicable, a duly signed joint venture agreement (JVA) in case the joint venture is already in existence **or** duly notarized statements from all the potential joint venture partners stating that they will enter into and abide by the provisions of the JVA in the instance that the bid is successful.

## II. FINANCIAL COMPONENT ENVELOPE

- (i) Original of duly signed and accomplished Financial Bid Form; **and**
- (j) Original of duly signed and accomplished Price Schedule(s).

Other documentary requirements under RA No. 9184 (as applicable)

- (k) *[For foreign bidders claiming by reason of their country's extension of reciprocal rights to Filipinos]* Certification from the relevant government office of their country stating that Filipinos are allowed to participate in government procurement activities for the same item or product.
- (l) Certification from the DTI if the Bidder claims preference as a Domestic Bidder or Domestic Entity.

*\*Editable versions of Standard Bidding Forms, may be downloaded at the gppb website, link as follows: <https://www.gppb.gov.ph/downloadable-forms/#tab-61412>*

**Statement of all Ongoing Government and Private Contracts Including  
Contracts Awarded but not yet Started**  
*[shall be submitted with the Bid]*

Business Name : \_\_\_\_\_  
Business Address : \_\_\_\_\_

Name of Client/ Contact Person/Contact Number/Contact Email Address	Date of the Contract	Title of the Project in the Contract	Kinds of Goods	Total Amount of Contract	Value of Outstanding Contracts	Date of Delivery
<u>Government</u>						
<u>Private</u>						

Submitted by : \_\_\_\_\_  
(Print Name and Signature)

Designation : \_\_\_\_\_

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

*Instructions:*

- i. State **ALL** ongoing contracts including those awarded but not yet started (government **[including the PEZA]** and private contracts which may be **similar or not similar** to the project subject of the bidding) as of the deadline for the submission of bids.
- ii. If there is no ongoing contract including those awarded but not yet started as of the aforementioned period, state none or its equivalent term.
- iii. The total amount of the ongoing and awarded but not yet started contracts must be consistent with those used in the Net Financial Contracting Capacity (NFCC).

**Statement of Single Largest Completed  
Contract which is similar in Nature**

*[shall be submitted with the Bid]*

Business Name : \_\_\_\_\_  
Business Address : \_\_\_\_\_

Name of Client/ Contact Person/Contact Number/Contact Email Address	Date of Contract	Title of the Contract/Na me of the Project	Kinds of Goods	Amount of Contract	Date of Acceptance	End User's Acceptance or Official receipt(s) issued for the Contract

Submitted by : \_\_\_\_\_  
(Print Name and Signature)

Designation : \_\_\_\_\_

Date : \_\_\_\_\_ *Instructions:*  
s

- a. Pursuant to Section 23.4.1.3 of the 2016 Revised IRR of RA No. 9184, the Bidder shall have an SLCC that is at least one (1) contract similar to the Project, the value of which, adjusted to current prices using the PSA's CPI, must be at least equivalent to the following requirements:
- i. a single contract that is similar to this Project, equivalent to at least fifty percent (50%) of the ABC; and
  - ii. It should have been completed (i.e., accepted) within three (3) years prior to the deadline for the submission of bids.

Note: Date of Acceptance shall mean the date when the items delivered have **satisfactorily met** the requirements of the procuring entity, as evidenced by either a Certificate of Final Acceptance and/or Completion from the bidder's client, or an Official Receipt or a Sales Invoice.

