PHILIPPINE BIDDING DOCUMENTS

Procurement of Consulting Services for the Formulation of Master Plan and Feasibility Study for Mapurao Township in Santa Ana, Cagayan

Government of the Republic of the Philippines

Cagayan Economic Zone Authority

Preface

These Philippine Bidding Documents (PBDs) for the procurement of Consulting Services through Competitive Bidding have been prepared by the Government of the Philippines (GoP) for use by all branches, agencies, departments, bureaus, offices, or instrumentalities of the Government, including government-owned and/or -controlled corporations (GOCCs), government financial institutions (GFIs), state universities and colleges (SUCs), local government units (LGUs), and autonomous regional government. The procedures and practices presented in this document have been developed through broad experience, and are for mandatory use in projects that are financed in whole or in part by the GoP or the World Bank or any foreign government/foreign or international financing institution in accordance with the provisions of the 2016 Revised Implementing Rules and Regulations (IRR) of Republic Act 9184 (R.A. 9184).

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 minimum eligibility requirements of bidders, such as track record to be determined by the Head of the Procuring Entity; (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 PBDs groups the provisions that are intended to be used unchanged in Section II. Eligibility 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. Eligibility Data Sheet (EDS) 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 the attachments.

Care should be taken to check the relevance of the provisions of the Bidding Documents against the requirements of the specific Consulting Services to be procured. 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 PBDs 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 advertised/posted until the deadline for the submission and receipt of bids

(c) Specific details, such as the "name of the Procuring Entity" and "address for proposal submission," should be furnished in the EDS, BDS, and SCC. The final documents should contain neither blank spaces nor options.

(d) This Preface and the footnotes or notes in italics included in the Request for Expression of Interest, EDS, 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 contain no footnotes except **Error! Reference source not found.** of Part II 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 should be modified as required to identify the Bidding Documents as to the names of the Project, Contract, and Procuring Entity, in addition to date of issue.

(g) If modifications must be made to bidding procedures, they can be presented in the BDS. Modifications for specific Project or Contract should be provided in the SCC as amendments to the Conditions of Contract. For easy completion, whenever reference has to be made to specific clauses in the EDS, BDS, or SCC these terms shall be printed in bold type face on Section II. Eligibility Documents, Section I. Instructions to Bidders, and Section III. General Conditions of Contract, respectively.

TABLE OF CONTENTS

PART I

SECTION I. REQUEST FOR EXPRESSION OF INTEREST 5

SECTION II. ELIGIBILITY DOCUMENTS 11

SECTION III. ELIGIBILITY DATA SHEET.....18

PART II

SECTION I. NOTICE OF ELIGIBILITY AND SHORT LISTING .. ERROR! BOOKMARK NOT DEFINED.

SECTION II. INSTRUCTIONS TO BIDDERS .....ERROR! BOOKMARK NOT DEFINED.

SECTION III. BID DATA SHEET.....ERROR! BOOKMARK NOT DEFINED.

SECTION IV. GENERAL CONDITIONS OF CONTRACT.... ERROR! BOOKMARK NOT DEFINED.

SECTION V. SPECIAL CONDITIONS OF CONTRACT ..... ERROR! BOOKMARK NOT DEFINED.

SECTION VI. TERMS OF REFERENCE.....ERROR! BOOKMARK NOT DEFINED.

SECTION VII. BIDDING FORMS.....ERROR! BOOKMARK NOT DEFINED.

SECTION VIII. APPENDICES .....ERROR! BOOKMARK NOT DEFINED.

Section I. Request for Expression of Interest

Notes on 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) Posted continuously in the Philippine Government Electronic Procurement System (PhilGEPS) website and the website of the Procuring Entity concerned, if available, and the website prescribed by the foreign government/foreign or international financing institution, if applicable, seven (7) calendar days starting on the date of advertisement; and

(b) Posted at any conspicuous place reserved for this purpose in the premises of the Procuring Entity concerned for seven (7) calendar days, as certified by the head of the Bids and Awards Committee (BAC) Secretariat of the Procuring Entity concerned.

(c) Advertised at least once in a newspaper of general nationwide circulation which has been regularly published for at least two (2) years before the date of issue of the advertisement, subject to Sections 21.2.1(c) of the IRR of R.A. 9184[1];

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 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;

---

[1] *Two years after effectivity of the 2016 Revised IRR of RA 9184 on* ***28 October 2016****, advertisement in a newspaper of general nationwide circulation shall no longer be required. However, a Procuring Entity that cannot post its opportunities in the PhilGEPS for justifiable reasons shall continue to publish its advertisements in a newspaper of general nationwide circulation.*

(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;

(c) 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

(d) The contract duration.

In the case of WB 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.

REPUBLIC OF THE PHILIPPINES
OFFICE OF THE PRESIDENT
Cagayan Economic Zone Authority

REQUEST FOR EXPRESSION OF INTEREST (EOI)

Procurement of Consulting Services for the Formulation of Master Plan and Feasibility Study for the Mapurao Township in Santa Ana, Cagayan

1. The Cagayan Economic Zone Authority (CEZA) through the Corporate Operating Budget CY2019 intends to apply the sum of **SIXTY-SIX MILLION PESOS (PhP 66,000,000.00)** inclusive of all applicable government taxes and charges, professional fees, and other incidental and administrative costs, as the Approved Budget for the Contract (ABC), to payments under the Contract for the subject consulting services. Proposals received in excess of the ABC shall be automatically rejected at the opening of the Financial Proposals.

2. The CEZA now calls for the submission of EOI and eligibility requirements for the **Procurement of Consulting Services for the Formulation of Master Plan and Feasibility Study for the Mapurao Township in Santa Ana, Cagayan.** The contract shall be completed within **nine (9) months.**

   EOI and Eligibility submissions of interested Consultants must be duly received by the CEZA Bids and Awards Committee (BAC) on or before **February 26, 2019, 9:00AM**, at the following address:

   DHART E. CARPIO
   BAC Chairman
   10th Flr., Greenfield Tower, Mayflower cor. Williams Sts., Greenfield District, Mandaluyong City

3. Interested Consultants may obtain further information from CEZA and acquire a complete set of Bidding/Proposal Documents at the address given above from Mondays to Fridays, 8:00AM to 5:00PM, starting February 19-26, 2019 upon payment of the applicable fee for the Bidding/Proposal Documents in the amount of **PhP 50,000.00**. The Bidding/Proposal Documents may also be downloaded free of charge from the Philippine Government Electronic Procurement System (PhilGEPS) and CEZA websites, provided that Consultants shall pay the applicable fee for the Bidding/Proposal Documents not later than the submission of their proposals.

4. A Pre-Proposal/Bid Conference will be held on February 27, 2019, 11:00AM at 10th Flr., Greenfield Tower, Mayflower cor. Williams Sts., Greenfield District, Mandaluyong City and will be open only to Consultants who have paid the corresponding fee for the Bidding/Proposal Documents. Representative/s should bring a letter addressed to the BAC Chairman certifying that the representative/s has/have authority to speak for and in behalf of the Consultant.

5. Interested Consultants have the option to submit their Legal, Financial and Class "B" Eligibility Documents (1 original copy and 4 copies), as applicable, in advance **(on or before February 26, 2019, 9:00AM)** for preliminary evaluation by the BAC in terms of completeness/compliance. The BAC, however, shall only proceed with the preliminary evaluation upon payment of a participation fee of **PhP 10,000.00**. Note that said amount shall cover the attendant administrative cost for the eligibility check and shortlisting process and shall be deducted from the cost of the

Bidding/Proposal Documents. The BAC, after its preliminary evaluation of advance submissions, shall inform the participating Consultants of any deficiency in their respective submissions at least three (3) calendar days prior to the deadline for submission of Eligibility Documents set in this Request for EOI.

6. The BAC shall draw up the short list of Consultants from those who have submitted EOI, including the Eligibility Documents, and have been determined as eligible in accordance with the relevant provisions of Republic Act (RA) No. 9184, or the Government Procurement Reform Act (GPRA), and its Revised Implementing Rules and Regulations (IRR). The short list shall consist of three (3) to seven (7) prospective Consultants who will be entitled to submit proposals. The criteria and rating system for shortlisting are as follows:

Criteria/Particulars	**Firm**
I. Experience and Capability of the Firm	Max 60 points
a. Years in the Consulting Services *b.* Related Experience/Previous Engagements i. Similar Experience ii. Relevant Experience	
II. Qualification of Personnel Who May Be Assigned to the Study*	30 points
a. Education *b.* Relevant Training *c.* Related Experience	
III. Financial/Job Capacity**	10 points
Grand Total	100 points

*Only organic personnel may be nominated for the purposes of eligibility and shortlisting wherein the number of nominated personnel must correspond to at least 50 percent of the identified experts under the TOR. However, the personnel to be proposed/nominated under the technical proposal (of shortlisted consultants) may be non-organic and may not be the same personnel nominated in the shortlisting, provided that, the technical proposal (of shortlisted consultants) must include a signed written letter of commitment under oath from the nominated personnel that services of said personnel shall be available for the study should the firm/consultant is awarded the contract. An individual expert for a particular position may only be nominated by one (1) firm for that position.

$$\text{**Financial Capacity} = \frac{\text{Current Assets} - \text{Current Liabilities} - \text{2 months of all ongoing contracts}}{\text{2 months of reimbursable expenses}}$$

7. The selection process will be conducted through open competitive bidding procedures using non-discretionary "pass/fail" criterion as specified in the IRR of RA 9184. This procurement activity is open to all interested Consultants subject to the conditions for eligibility provided in said Revised IRR.

8. Proposals shall be evaluated using the Quality Based Evaluation/Selection (QBE/QBS) procedure.

9. CEZA reserves the right to reject any and all proposals, including that of a single eligible proponent, waive any minor deviation in the submitted documents which will not materially affect the substance of the proposal, annul the procurement/bidding process, or not award the contract without thereby incurring any liability to the affected participating Consultant/s.

10. For further information, please contact the BAC Secretariat:

    THE BAC SECRETARIAT
    10th Flr., Greenfield Tower, Mayflower cor. Williams Sts.,
    Greenfield District, Mandaluyong City
    CP No. 0918-8001351

Issued on February 19, 2019.

(sgd.) DHART E. CARPIO
Chairman
Bids and Awards Committee

Section II. Eligibility Documents

Notes on the Eligibility Documents

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

The provisions contained in this Section are to be used unchanged. Additional information or requirements specific to each procurement shall be specified in the EDS.

1. Eligibility Criteria

1.1. The following persons/entities shall be allowed to participate in the bidding for Consulting Services:

(a) Duly licensed Filipino citizens/sole proprietorships;

(b) Partnerships duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the interest belongs to citizens of the Philippines;

(c) Corporations duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the outstanding capital stock belongs to citizens of the Philippines;

(d) Cooperatives duly organized under the laws of the Philippines; or

(e) Persons/entities forming themselves into a joint venture, *i.e.*, a group of two (2) or more persons/entities that intend to be jointly and severally responsible or liable for a particular contract: Provided, however, That Filipino ownership or interest thereof shall be at least sixty percent (60%). For this purpose, Filipino ownership or interest shall be based on the contributions of each of the members of the joint venture as specified in their JVA.

1.2. When the types and fields of Consulting Services involve the practice of professions regulated by law, those who will actually perform the services shall be Filipino citizens and registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions specified in the **EDS**.

1.3. If the Request for Expression of Interest allows participation of foreign consultants, prospective foreign bidders may be eligible subject to the conditions stated in the **EDS**.

1.4. Government owned or –controlled corporations (GOCCs) may be eligible to participate only if they can establish that they (a) are legally and financially autonomous, (b) operate under commercial law, and (c) are not attached agencies of the Procuring Entity.

2. Eligibility Requirements

2.1. The following eligibility requirements, together with the Eligibility Documents Submission Form, shall be submitted on or before the date of the eligibility check specified in the Request for Expression of Interest and Clause 5 for purposes of determining eligibility of prospective bidders:

(a) Class "A" Documents –

Legal Documents

(i) PhilGEPS Certificate of Registration and Membership in accordance with Section 8.5.2 of the IRR, except for foreign bidders participating in the procurement by a Philippine Foreign Service Office or Post, which shall submit their eligibility documents under Section 24.1 of the IRR, provided, that the winning Consultant shall register with PhilGEPS in accordance with Section 37.1.4 of the IRR;

Technical Documents

(ii) Statement of the prospective bidder of all its ongoing and completed government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid, within the relevant period provided in the **EDS**. The statement shall include, for each contract, the following:

(ii.1) the name and location of the contract;

(ii.2) date of award of the contract;

(ii.3) type and brief description of consulting services;

(ii.4) consultant's role (whether main consultant, subconsultant, or partner in a JV)

(ii.5) amount of contract;

(ii.6) contract duration; and

(ii.7) certificate of satisfactory completion or equivalent document specified in the **EDS** issued by the client, in the case of a completed contract;

(iii) Statement of the consultant specifying its nationality and confirming that those who will actually perform the service are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions in accordance with Clause 1.2, including their respective curriculum vitae.

(b) Class "B" Document –

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

2.2. The eligibility requirements or statements, the bids, and all other documents to be submitted to the BAC must be in English. If the eligibility requirements or statements, the bids, and all other documents submitted to the BAC are in foreign language other than English, it must be accompanied by a translation

of the documents in English. The documents shall be translated by the relevant foreign government agency, the foreign government agency authorized to translate documents, or a registered translator in the foreign bidder's country; and shall be authenticated by the appropriate Philippine foreign service establishment/post or the equivalent office having jurisdiction over the foreign bidder's affairs in the Philippines. The English translation shall govern, for purposes of interpretation of the bid.

2.3. Prospective bidders may obtain a full range of expertise by associating with individual consultant(s) and/or other consultants or entities through a JV or subcontracting arrangements, as appropriate. However, subconsultants may only participate in the bid of one short listed consultant. Foreign Consultants shall seek the participation of Filipino Consultants by entering into a JV with, or subcontracting part of the project to, Filipino Consultants.

3. Format and Signing of Eligibility Documents

3.1. Prospective bidders shall submit their eligibility documents through their duly authorized representative on or before the deadline specified in Clause 5.

3.2. Prospective bidders shall prepare an original and copies of the eligibility documents. In the event of any discrepancy between the original and the copies, the original shall prevail.

3.3. The Eligibility Documents Submission Form shall be signed by the duly authorized representative/s of the Bidder. Failure to do so shall be a ground for the rejection of the eligibility documents.

3.4. Any interlineations, erasures, or overwriting shall be valid only if they are signed or initialed by the duly authorized representative/s of the prospective bidder.

4. Sealing and Marking of Eligibility Documents

4.1. Prospective bidders shall enclose their original eligibility documents described in Clause 2.1, in a sealed envelope marked "ORIGINAL – ELIGIBILITY DOCUMENTS". Each copy thereof shall be similarly sealed duly marking the envelopes as "COPY NO. ___ - ELIGIBILITY DOCUMENTS". These envelopes containing the original and the copies shall then be enclosed in one single envelope.

4.2. The original and the number of copies of the eligibility documents as indicated in the **EDS** shall be typed or written in ink and shall be signed by the prospective bidder or its duly authorized representative/s.

4.3. All envelopes shall:

(c) contain the name of the contract to be bid in capital letters;

(d) bear the name and address of the prospective bidder in capital letters;

(e) be addressed to the Procuring Entity's BAC specified in the **EDS**;

(f) bear the specific identification of this Project indicated in the **EDS**; and

(g) bear a warning "DO NOT OPEN BEFORE…" the date and time for the opening of eligibility documents, in accordance with Clause 5.

4.4 Eligibility documents that are not properly sealed and marked, as required in the bidding documents, shall not be rejected, but the bidder or its duly authorized representative shall acknowledge such condition of the documents as submitted. The BAC shall assume no responsibility for the misplacement of the contents of the improperly sealed or marked eligibility documents, or for its premature opening.

5. Deadline for Submission of Eligibility Documents

Eligibility documents must be received by the Procuring Entity's BAC at the address and on or before the date and time indicated in the Request for Expression of Interest and the **EDS**.

6. Late Submission of Eligibility Documents

Any eligibility documents submitted after the deadline for submission and receipt prescribed in Clause 0 shall be declared "Late" and shall not be accepted by the Procuring Entity. The BAC shall record in the minutes of submission and opening of eligibility documents, the Bidder's name, its representative and the time the eligibility documents were submitted late.

7. Modification and Withdrawal of Eligibility Documents

7.1. The prospective bidder may modify its eligibility documents after it has been submitted; provided that the modification is received by the Procuring Entity prior to the deadline specified in Clause 5. The prospective bidder shall not be allowed to retrieve its original eligibility documents, but shall be allowed to submit another set equally sealed, properly identified, linked to its original bid marked as "ELIGIBILITY MODIFICATION" and stamped "received" by the BAC. Modifications received after the applicable deadline shall not be considered and shall be returned to the prospective bidder unopened.

7.2. A prospective bidder may, through a letter of withdrawal, withdraw its eligibility documents after it has been submitted, for valid and justifiable reason; provided that the letter of withdrawal is received by the Procuring Entity prior to the deadline prescribed for submission and receipt of eligibility documents.

7.3. Eligibility documents requested to be withdrawn in accordance with this Clause shall be returned unopened to the prospective bidder concerned. A prospective bidder that withdraws its eligibility documents shall not be permitted to submit another set, directly or indirectly, for the same project. A prospective bidder that acquired the eligibility documents may also express its intention not to participate in the bidding through a letter which should reach

and be stamped by the BAC before the deadline for submission and receipt of eligibility documents.

8. Opening and Preliminary Examination of Eligibility Documents

8.1. The BAC will open the envelopes containing the eligibility documents in the presence of the prospective bidders' representatives who choose to attend, at the time, on the date, and at the place specified in the **EDS**. The prospective bidders' representatives who are present shall sign a register evidencing their attendance.

In case the submitted eligibility envelopes cannot be opened as scheduled due to justifiable reasons, the BAC shall take custody of the said envelopes and reschedule the opening on the next working day or at the soonest possible time through the issuance of a Notice of Postponement to be posted in the PhilGEPS website and the website of the Procuring Entity concerned.

8.2. Letters of withdrawal shall be read out and recorded during the opening of eligibility documents and the envelope containing the corresponding withdrawn eligibility documents shall be returned unopened to the withdrawing prospective bidder.

8.3. The eligibility documents envelopes and modifications, if any, shall be opened one at a time, and the following read out and recorded:

(h) the name of the prospective bidder;

(i) whether there is a modification or substitution; and

(j) the presence or absence of each document comprising the eligibility documents vis-à-vis a checklist of the required documents.

8.4. The eligibility of each prospective bidder shall be determined by examining each bidder's eligibility requirements or statements against a checklist of requirements, using non-discretionary "pass/fail" criterion, as stated in the Request for Expression of Interest, and shall be determined as either "eligible" or "ineligible." If a prospective bidder submits the specific eligibility document required, he shall be rated "passed" for that particular requirement. In this regard, failure to submit a requirement, or an incomplete or patently insufficient submission, shall be considered "failed" for the particular eligibility requirement concerned. If a prospective bidder is rated "passed" for all the eligibility requirements, he shall be considered eligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as "eligible." If a prospective bidder is rated "failed" in any of the eligibility requirements, he shall be considered ineligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as "ineligible." In either case, the BAC chairperson or his duly designated authority shall countersign the markings.

9. Short Listing of Consultants

9.1. Only prospective bidders whose submitted contracts are similar in nature and complexity to the contract to be bid as provided in the **EDS** shall be considered for short listing.

9.2. The BAC shall draw up the short list of prospective bidders from those declared eligible using the detailed set of criteria and rating system to be used specified in the **EDS**.

9.3. Short listed consultants shall be invited to participate in the bidding for this project through a Notice of Eligibility and Short Listing issued by the BAC.

10. Protest Mechanism

Decision of the Procuring Entity at any stage of the procurement process may be questioned in accordance with Section 55 of the IRR of RA 9184.

Section III. Eligibility Data Sheet

Notes on the Eligibility 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 Eligibility 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 provisions of the Eligibility Documents must be incorporated.

(b) Amendments and/or supplements, if any, to provisions of the Eligibility Documents as necessitated by the circumstances of the specific procurement, must also be incorporated.

Eligibility Data Sheet

Eligibility Documents	
1.2	Not applicable.
1.3	No further instructions.
2.1(a)(ii)	The statement of all ongoing and completed government and private contracts shall include all such contracts within twenty (20) years prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	At least one (1) copy of Certificate of project completion/acceptance or equivalent certification from previous related studies/projects within the last twenty (20) years
4.2	Each prospective bidder shall submit one (1) original and five (5) copies of its eligibility documents.
4.3 (e)	CEZA Bids and Awards Committee 10 Floor Greenfield Tower, Mayflower cor. Williams Streets, Greenfield District Mandaluyong City, Metro Manila
4.3 (f)	Procurement of Consulting Services for the Formulation of Master Plan and Feasibility Study for Mapurao Township in Santa Ana, Cagayan
5.0	The address for submission of eligibility documents is 10 Floor Greenfield Tower, Mayflower cor. Williams Streets, Greenfield District Mandaluyong City, Metro Manila The deadline for submission of eligibility documents is February 26, 2019 at 9:00 AM.
8.0	The place of opening of eligibility documents is 10 Floor Greenfield Tower, Mayflower cor. Williams Streets, Greenfield District Mandaluyong City, Metro Manila. The date and time of opening of eligibility documents is February 26, 2019 at 11:00 AM.
9.1	Similar contracts shall refer to consultancy services such as Master Plan, Feasibility Study, Detailed Engineering Design, and related works.
9.2	Shortlisting will be based on applicable experience of the firm, qualifications of key personnel who may be assigned to the job, and job capacity. Job capacity will be measured in terms of financial capacity using the formula: FC = (current assets – current liabilities – 2 months of all ongoing

	contracts) 2 months of total reimbursable expenses The minimum score required to be shortlisted is **70 points/100 points**.

Republic of the Philippines
gppb
Government Procurement Policy Board

TERMS OF REFERENCE
Formulation of Master Plan and Feasibility Study for Mapurao Township

1. BACKGROUND/RATIONALE

The Cagayan Freeport is envisioned to become an agro industrial growth zone, a major transshipment port and a tourism and eco- tourism haven serving as a vibrant hub of economic activities in East and Southeast Asia and spurring economic activity and employment in Northern Philippines. This vision will only be realized with the development of key infrastructure components that will make the Cagayan Freeport viable for investment, tourism and recreation. An area catering to local and international markets and clients must have facilities, amenities, as well as services that are acceptable in international standards.

The Mapurao Township Development is a 203.63 hectare property in Sitio Mapurao Barangay San Vicente identified to be a site for an pleasant, vibrant and contemporary township within Cagayan Freeport. The areas will accommodate new residents in the Cagayan Freeport that would establish new enterprises particularly those from the BPO and gaming industry. In addition to this, the township envisages to offer luxury residential areas, modern shopping centers and relaxing open leisure spaces.

Phase 1 of the Project shall include the following:

- Condo Hotels 1,500 units in 3 blocks
- On shore and Offshore casino
- Resort Village 30 units, seaside paradise and outdoor café
- Helicopter Landing Pad
- 1000 Car Park Area
- Bistro and Pub
- Residency Area- 1000 units double storey
- Middle Range Condominium
- Clinic Emergency Trauma Center
- Shop Lots
- Hostels

Phase 2 of the Project shall include the following:

- Shopping Mall
- Five Star Hotel attached to a Casino
- Restaurant
- Exhibition Convention Hall

Phase 3 of the Project shall include the following:

- Sport Centre (Olympic Swimming Pool, Badminton and Basketball court)
- Golf Club and Range

Phase 4 of the Project shall include the following:

- Education City (Pre-school to Tertiary Education)

Phase 5 of the Project shall include the following:

- Nursing House
- Private Hospital

2. OBJECTIVE, PURPOSE & EXPECTED RESULTS

2.1. Overall Objective of the Study

The objective of the Consultancy Service is to formulate a technically, economically feasible andsocially/environmentally sustainable master plan for the development of the Mapurao Township providing sufficient detailfor its implementation, including layout plan of the utilities and road networks for Mapurao Township.

2.2. Key Project Tasks

The key tasks for the formulation of the Mapurao Township include determining:

- how the overall plan design should be refined in light of new survey information,
- a review of previous and ongoing studies, committed locators/partners, and phasing of development and;
- what growth planning assumptions would be needed in order to drive the planned land mix and use (i.e. residential, industrial, commercial, etc.), and, whether they seem reasonable inlight of the current market.

2.3. Expected Results

Expected outputs for the Mapurao Township would include:

- which roads should be built first and why, and the parameters (detailed design) of the roads;
- what topography, waterways, drainage, and other natural features of the site need to be preserved
- what are the civil infrastructure considerations based on the water supply and waste
- treatment, electricity, communication, projected growth, the overall development strategy, and their phasing
- where the major infrastructure would be located, and how the networks of collection and distribution might be routed, according to road layouts and topography; and
- whether or not the development passes a preliminary feasibility test.

3. STUDY AREA

The Project is envisioned to be situated within the boundaries of the Cagayan Economic Zone and Freeport. It is located in the northeastern part of Luzon spanning an area of 54,000 hectares. Further, it covers the entire Municipality of Sta. Ana, Cagayan, including the islands of Fuga, Barit and Mabbag located in Aparri, Cagayan.

The Project is envisioned to be situated within Sitio Mapurao, Barangay San Vicente, Sta. Ana, Cagayan within the Cagayan Freeport. It is located in the northern part of the municipality containing an area of 158 hectares.

4. SCOPE OF WORKS

- Site Survey and Review of Current Status & Potential
- Formulation of Development Vision & Conceptual Plan
- Land Use Distribution and Public Utilities Layout Plan (Refining)
- Preliminary Design of Infrastructure
- Initial Environmental Examination (IEE)
- Project Implementation Scheme
- Business Plan
- Fast Track Infrastructure Planning
- Feasibility Study

4.1. Review and Survey of Current Status & Potential

The purpose of this work is to review the current status of the project site and realize the outstanding potentials, issues or key factors for the promotions of the MAPURAO TOWNSHIP DEVELOPMENT. The following work items should be conducted to identify necessary pre-conditions for the planning. Target area of this work should not be limited only on the project sites. Existing and relevant plans should be also reviewed through this work.

- Review and Matching to National Strategies and Policies
- Review and Matching with the CEZA General Land Use and Master Plan
- Macroeconomic Review (including population and employment in the surrounding municipalities)
- Natural Environmental Analysis (Disaster Risk, Land Grading)
- Infrastructure Survey (Outer and Inner of the project site)
- Review of Relevant Development Plan, Programs, Projects, and Surveys which were conducted in the past

4.2. Review of Development Vision & Conceptual Design

Based on the result of review and survey of current status and potential, the project direction and framework should be set as the initial stage of planning for MAPURAO TOWNSHIP DEVELOPMENT. It is important process to share and have the consensus of the future image of the project among stakeholders. Projection of future population and employment volume with zoning in MAPURAO TOWNSHIP DEVELOPMENT is also included in the scope**.**

4.2.1. Review of Development Visions and Philosophy

Development visions and philosophy should be considered and proposed in line with national strategies and market needs to attract investors and customers to the project. The consultant shall set a "Realistic Timeline" for the development to make the project feasible. The Realistic Timeline will be used as bench-marks for future monitoring.

(1) Development Visions and Philosophy and its Realistic Timeline
(2) Development Rationale
(3) Expected development timeline, including target completion date
(4) Unique Selling Points (Partners and Catalyst Projects) (eg. Satellite Center, and Airport SEZ)
(5) Basic Concept and Service Level (eg. Zero Emission, Smart City, Green City, High Quality Social Service, High-tech Park, Safety and Security)

4.2.2. Setting of Development Framework (Economic and Population Frameworks)

4.2.2.1. Industrial Structure

Industrial structure should be examined with estimate share of each industry (primary, secondary, and tertiary industry with those sub-categories). The consultant shall project what industry meet for MAPURAO TOWNSHIP DEVELOPMENT by the consultant's own approach.

4.2.2.2. Strategic actions to boost the population and employment

Consultant itself shall set at least three proactive strategic actions that area developer will likely conduct for boosting the base case population and employment. Then, under the condition of each strategic action, population and employment shall be projected with the Realistic Timeline.

4.2.3. Demand Forecast

Based on the Development Framework, demand forecast of population allocation, land use, traffic volume, infrastructure, and social service should be conducted for each target year.

(1) Population Allocation and Land Use Demand
(2) Traffic Volume Forecast
(3) Civil Infrastructure
(4) Social Service Demand Forecast

4.2.4. Setting of Development Strategies

Development strategies covering relevant land use and infrastructure sectors should be discussed and agreed, then documented.

(1) Industrial & Agricultural Development (Services including Manufacturing, Logistics, High-valued Agriculture, etc.)
(2) Other Commercial Development, including Tourism
(3) Residential Development
(4) Civic/Institutional
(5) Social Services (Medical, Education, Community Center, etc.)
(6) Transportation, Road Network, Logistics, and Transit hub
(7) Infrastructures

4.2.5. Conceptual Design of Priority Projects

A schematic concept and visual images, outline facility program should be indicated with design images.
(1) Development Alternatives and selection of Preferred Plan
(2) Definition of Urban Design Structure Integrating Land-Use, Transportation, Open space and Landscape Strategies
(3) Refinement of Selected Master Plan
(4) Preparation of Draft and Final Concept Master Plan Report
(5) Development of an Architecture Layout

4.3. Preliminary Design of Infrastructure

Land grading plan should be made first considering the existing topo data and flood elevation. Based on the grading and use plans, layout plans for each of the key utilities (water supply, sewer, drainage, power supply, information and communication) should be

made showing the distribution/collection networks, with notations regarding the anticipated size of the pipe mains, drains, ditches, cables, etc.

4.3.1. Land Grading
(1) Flood Analysis
(2) Site Grading Plan
(3) Earthworks

4.3.2. Road System (High Level Concept)
(1) Inputs to Design Concept (Functional classification, Traffic volume, Traffic flow)
(2) Inputs to Preliminary Design (Typical road section/ pavement, Intersection, and Bridge/Culvert)

4.3.3. Drainage System (High Level Concept)
(1) Inputs to Design Concept
(2) Inputs to Preliminary Design (Drainage ditch, and Retention Pond)

4.3.4. Water Supply System (High Level Concept)
(1) Design Concept
(2) Water Demand Forecast
(3) Preliminary Design (Water Sources, Water Treatment Plant, and Distribution System)

4.3.5. Sewerage System (High Level Concept)
(1) Design Concept
(2) Waste Water Generation
(3) Preliminary Design (Sewage Treatment Plant)

4.3.6. Power Supply System (High Level Concept)
(1) Design Conditions
(2) Power Demand Forecast
(3) Preliminary Design
(4) Exploring the possibility renewable generation facility.

4.3.7. Information and Communication System (High Level Concept)
(1) Design Concept
(2) Telecom Demand
(3) Preliminary Design (Information and Communication System)

4.4. Initial Environmental Examination

For smooth project implementation, assess and determine the reportorial requirements of DENR-EMB should the project proponent secure an Environmental Compliance Certificate (ECC). This might need the conduct of an initial environmental and social examination (IEE). Idea and process of strategic environmental assessment in the planning phase should be considered to avoid big risk on environmental and social matter in later stage. Countermeasures and mitigation plan against risks and issues should be proposed in the IEE work.

4.4.1. Environmental Aspect
a. Environmental Baseline Analysis
b. Conduct site assessment and gather information on the following:
- The Land

i. Land Use and Classification
ii. Geology/Geomorphology
iii. Terrestrial Ecology

b. The Water
i. Hydrology and Hydrogeology, if deemed necessary
ii. Water Quality
iii. Aquatic Ecology, if deemed necessary

c. The Air
i. Meteorology/Climatology
ii. Air Quality, if deemed necessary
iii. Noise and vibration

d. The People
i. Socio-economics
ii. Public Health
iii. Traffic

c. Development Suitability Mapping
d. Physical Planning Recommendations to Support Local Ecology

4.4.2. Social Aspect
4.4.3. Strategic Environmental Assessment and Measures

4.5. Feasibility Study

Project implementation scheme is necessary in order to bring the project from planning stage to implementation stage certainly. All work items should be included to secure of project's feasibility. Firstly preliminary cost should be estimated based on work results of the conceptual design and preliminary design of infrastructure. Other works below should be followed by the preliminary cost estimation. Finally project schedule with phasing process should be proposed under consideration of economic and financial aspects.

- Preliminary Cost Estimation
- Economical and Financial Analysis
- Implementation Arrangements
- Risk Analysis and Countermeasure
- Project Schedule (incl. Phasing Development)

4.6. Environmental Impact Assessment

The activities discussed herein address the various requirements that will be the basis of evaluation consistent with the requirement of this project. The following activities shall be undertaken: scoping, baseline and impact assessment works, household surveys, public information and communication, preparation of the Environment Impact Statement (EIS), defense of the EIS, public hearing and other support services.

The study modules of the EIS, depending on the scoping that will be initiated by the Consultant for the Client, will cover the following:

- Scoping;
- Project Description;

- Meteorology and Hydrology;
- Water Quality;
- Air and Noise Quality;
- Environmental Risk Assessment;
- Abandonment Plan;
- Marine/Freshwater Biology;
- Wildlife and Habitation;
- Socio-Economics;
- Culture and Archeology;
- Public Health;
- Perception/Household Surveys;
- Public Information and Communication;
- EIS Integration, Editing and Packaging;
- Printing of EIS;
- Public Consultation; and
- Defense of EIS and Support Services

4.7. Commencement Date and Period of Implementation

The Consultant shall complete the activities within a period of nine (9) months commencing from the date of receipt of the Notice to Proceed (NTP).

4.8. Deliverables

- Inception Report, work plan of the service, shall be submitted within one (1) month after commencement of the service.
- Progress Report shall be submitted on Month 2, 3,5, 6 and 7 after the commencement of the service.
- Interim Report shall be submitted within four (4) months after the commencement of the service.
- Draft Feasibility Report including drawings shall be submitted eight (8) months after the commencement of the service.
- Final Feasibility Report including drawings, all outputs of services, shall be submitted within 1 month from the receipt of the client's comments after the commencement of the service.

5. EXPERTISE REQUIREMENTS

The Consulting Services will be undertaken over a period of nine (9) months as shown below:

TABLE 1
IMPLEMENTATION SCHEDULE

No.	Activity	Months								
		Master Plan			Feasibility Study					
		1	2	3	4	5	6	7	8	9
1	Review and Survey of Current Status and Potential									
2	Review and Alignment of Plans with Development Vision and Conceptual Plan									
3	Public Utilities Layout Plan									
4	Preliminary Design of Infrastructure									
5	Environmental and Social Impact Assessment									
6	Feasibility Study									

No.	Activity	Master Plan			Feasibility Study					
		1	2	3	4	5	6	7	8	9
1	Inception Report	▼								
2	Progress Report		▼	▼		▼	▼	▼		
3	Interim Report				▼					
4	Draft Development Plan								▼	
5	Final Development Plan									▼

6. REQUIRED EXPERTISE

The required expertise and their corresponding qualifications to fulfill the project can be seen in **Tables 2 and 3** while their schedule of involvement can be found in **Table 4.**

TABLE 2
REQUIRED EXPERTISE

No.	Expert	Man Months
	Key Staff	
1	Team Leader/Land Use Planner/Urban Planner	9
2	Architect	8
3	Transportation Planner	5
4	Civil/Road Engineer	5
5	Drainage Engineer	5
6	Power/Electrical Engineer	5
7	Electronics/Telecommunications Engieer	5
8	Water Supply Engineer	5
9	Cost Engineer	5
10	Environmental Specialist	5
11	Social Development Specialist/ RAP	5
12	Market Expert	6
13	Business Plan Specialist	5
14	Economist	5
15	Financial Specialist	5
16	GIS Expert	8
17	Mechanical Engineer	5

TABLE 3
EXPERT QUALIFICATION

Key Staff	Qualifications
Team Leader/Land Use Planner/Urban Planner	The Team Leader must be an Urban Planner with at least 10 years of experience in Master Planning, Feasibility Study, Land Use Planning and has experience in development of Economic Zone. Must have experience as deputy team leader for master planning and feasibility study
Architect	Must be a licensed Architect with experience in designing and/or land use planning for economic zones and have a minimum of ten (10) years of experience as Senior Architect/Architect-in-charge /Urban Planner.

Transportation Planner	Must have a degree in Transport Engineering or Economics with at least 7 years as transportation planner in the Master Planning and Feasibility Study
Civil/Road Engineer	Must be a licensed Civil Engineer with at least 7 years experience as road engineer in master planning and feasibility study
Drainage Engineer	Must be a licensed Civil Engineer with at least 7 years experience as drainage engineer in master planning and feasibility study
Power/Electrical Engineer	Must be a licensed Electrical Engineer with at least 7 years experience as power and telecommunications specialist in master planning and feasibility study
Electronics/Telecommunications Engineer	Must be a licensed Electronics engineer with at least 7 years experience as power and telecommunications specialist in master planning and feasibility study
Water Supply and Wastewater Engineer	Must be a licensed Environmental/Sanitary Engineer with at least 7 years experience as water and wastewater specialist in master planning and feasibility study
Cost Engineer	Must be a graduate of Civil Engineering with at least 7 years experience as cost engineer in master planning and feasibility study
Environmental Specialist	Must be an environmental engineer or environmental specialist with at least 10 years experience as environmental specialist and has conducted environmental impact assessment in master planning and feasibility study
Social and Institutional Development Specialist	Must be graduate of social sciences, anthropology, and related studies with at least 7 years experience in master planning and feasibility study
Marketing Expert	Must be graduate of relevant business and management course, and related studies with at least 7 years experience in master planning and feasibility study
Business Plan Specialist	Must be graduate of relevant business and management course, and related studies with at least 7 years experience in master planning and feasibility study
Economist	Must be graduate of relevant business and management course, economics, and related studies with at least 7 years experience in master planning and feasibility study
Financial Specialist	Must be graduate of relevant business and management course, economics, and related studies with at least 7 years experience in master planning and feasibility study
GIS Expert	Must be graduate of engineering or relevant course or studies with at least 7 years experience as GIS expert in master planning and feasibility study
Mechanical Engineer	Must be licensed Mechanical Engineer with at least 7 years experience in master planning and feasibility study

TABLE 4
MANNING SCHEDULE

No.	Expert	Man Months	Master Plan			Feasibility Study					
			1	2	3	4	5	6	7	8	9
	Key Staff										
1	Team Leader/Land Use Planner/Urban Planner	9									
2	Architect	8									
3	Transportation Planner	5									
4	Civil/Road Engineer	5									
5	Drainage Engineer	5									
6	Power/Electrical Engineer	5									
7	Electronics/Telecommunications Engieer	5									
8	Water Supply Engineer	5									
9	Cost Engineer	5									
10	Environmental Specialist	5									
11	Social Development Specialist/ RAP	5									
12	Market Expert	6									
13	Business Plan Specialist	5									
14	Economist	5									
15	Financial Specialist	5									
16	GIS Expert	8									
17	Mechanical Engineer	5									
	Support Staff										
1	Researcher (2)	18									
2	Support Engineer (3)	27									
3	Support Architect (2)	18									
4	CAD Operator (2)	18									
5	Administrative Officer	9									
6	Secretary	9									

7. REQUIRED CERTIFICATION

The Consulting Firm/Bidder must have an ISO 9001:2015 Certification

8. TOTAL PROJECT COST

The total project cost is estimated to **SIXTY-SIX MILLION PESOS (Php 66,000,000.00)** including taxes and contingency amount.