

# **PHILIPPINE BIDDING DOCUMENTS**



## **PROCUREMENT OF COMPREHENSIVE MAINTENANCE SERVICE AGREEMENT FOR THE ENHANCED LICENSING SYSTEM (ELS) AND ORACLE DATABASE, BUSINESS INTELLIGENCE AND WEBLOGIC APPLICATIONS AND SERVERS FOR THE INSURANCE COMMISSION**

Government of the Republic of the  
Philippines  
Insurance Commission

**Project Reference Number: 2023 – 08 - 241**

Sixth Edition  
10 August 2023

# Preface

These Philippine Bidding Documents (PBDs) for the procurement of Goods through Competitive Bidding have been prepared by the Government of the Philippines for use by any branch, constitutional commission or office, agency, department, bureau, office, or instrumentality of the Government of the Philippines, National Government Agencies, including Government-Owned and/or Controlled Corporations, Government Financing Institutions, State Universities and Colleges, and Local Government Unit. 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 Government of the Philippines or any foreign government/foreign or international financing institution in accordance with the provisions of the 2016 revised Implementing Rules and Regulations of Republic Act No. 9184.

The Bidding Documents shall clearly and adequately define, among others: (i) the objectives, scope, and expected outputs and/or results of the proposed contract or Framework Agreement, as the case may be; (ii) the eligibility requirements of Bidders; (iii) the expected contract or Framework Agreement duration, the estimated quantity in the case of procurement of goods, delivery schedule and/or time frame; and (iv) the obligations, duties, and/or functions of the winning bidder.

Care should be taken to check the relevance of the provisions of the PBDs against the requirements of the specific Goods to be procured. If duplication of a subject is inevitable in other sections of the document prepared by the Procuring Entity, care must be exercised to avoid contradictions between clauses dealing with the same matter.

Moreover, each section is prepared with notes intended only as information for the Procuring Entity or the person drafting the Bidding Documents. They shall not be included in the final documents. The following general directions should be observed when using the documents:

1. All the documents listed in the Table of Contents are normally required for the procurement of Goods. However, they should be adapted as necessary to the circumstances of the particular Procurement Project.
2. Specific details, such as the “*name of the Procuring Entity*” and “*address for bid submission*,” should be furnished in the Instructions to Bidders, Bid Data Sheet, and Special Conditions of Contract. The final documents should contain neither blank spaces nor options.
3. This Preface and the footnotes or notes in italics included in the Invitation to Bid, Bid Data Sheet, General Conditions of Contract, Special Conditions of Contract, Schedule of Requirements, and Specifications are not part of the text of the final document, although they contain instructions that the Procuring Entity should strictly follow.

4. The cover should be modified as required to identify the Bidding Documents as to the Procurement Project, Project Identification Number, and Procuring Entity, in addition to the date of issue.
5. Modifications for specific Procurement Project details should be provided in the Special Conditions of Contract as amendments to the Conditions of Contract. For easy completion, whenever reference has to be made to specific clauses in the Bid Data Sheet or Special Conditions of Contract, these terms shall be printed in bold typeface on Sections I (Instructions to Bidders) and III (General Conditions of Contract), respectively.
6. For guidelines on the use of Bidding Forms and the procurement of Foreign-Assisted Projects, these will be covered by a separate issuance of the Government Procurement Policy Board.

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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 projects or consulting services. A Procurement Project shall be described, detailed, and scheduled in the Project Procurement Management Plan prepared by the agency which shall be consolidated in the procuring entity's Annual Procurement Plan. (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 COMPREHENSIVE MAINTENANCE SERVICE  
AGREEMENT FOR THE ENHANCED LICENSING SYSTEM (ELS)  
AND ORACLE DATABASE, BUSINESS INTELLIGENCE AND  
WEBLOGIC APPLICATIONS AND SERVERS FOR THE INSURANCE  
COMMISSION**

**(PROJECT REFERENCE No. 2023-08-241)**

1. The **Insurance Commission**, through the **Government of the Philippines (GOP)** under **2023 Special Account in the General Fund 151** intends to apply the sum of **Five Million Pesos (Php5,000,000.00), inclusive of 12% VAT**, being the Approved Budget for the Contract (ABC) to payments under the contract for the **Procurement of Comprehensive Maintenance for the Enhanced Licensing System (ELS) and Oracle Database, Business Intelligence and Weblogic Application and Servers for the Insurance Commission, Reference No. 2023 – 08 - 241**. Bids received in excess of the ABC for goods and services, and late bids shall be automatically rejected at bid opening.
2. The Insurance Commission (IC), through its Bids and Awards Committee, now invites bids for the **Procurement of Comprehensive Maintenance for the Enhanced Licensing System (ELS) and Oracle Database, Business Intelligence and Weblogic Application and Servers for the Insurance Commission**. Delivery of the Goods and Services is required as indicated in the **Bid Data Sheet**. Bidders should have completed, **within five (5) 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) 9184, otherwise known as the “Government Procurement Reform Act”. 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 5183.
4. Prospective Bidders may obtain further information from the IC-BAC Secretariat at Telephone No. 8523-8462 to 70 local 107 and inspect the Bidding Documents at the address given below from **9:00 AM to 4:00 PM, Monday to Friday**.

5. A complete set of Bidding Documents may be acquired by interested Bidders starting **15 August 2023** from the given address and the IC website (<https://www.insurance.gov.ph/public-bidding/>) 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 (Php5,000.00)**. The Procuring Entity shall allow the bidder to present its proof of payment for the fees through electronic means.

Moreover starting **15 August 2023**, the Bidding Documents may also be downloaded free of charge from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the IC website (<https://www.insurance.gov.ph/public-bidding/>), provided that Bidders shall pay the nonrefundable fee for the Bidding Documents not later than the submission of their bids.

6. The **Insurance Commission** will hold a **Pre-Bid Conference** on **25 August 2023, 1:30 PM** at the **IC Function Room, Insurance Commission, 1071 United Nations Avenue, Ermita, Manila** in accordance with Section 22.3 of the revised IRR of RA 9184, which shall be open to prospective bidders.
7. Bids must be duly received by the BAC Secretariat through manual submission at the office address indicated below on or before **08 September 2023, 12:00 NN**. Late bids shall not be accepted.
8. All Bids must be accompanied by a bid security in any of the acceptable forms and in the amount stated in **ITB** Clause 14.
9. Bid opening shall be on **08 September 2023, 1:30 PM** at the **IC Function Room, Insurance Commission, 1071 United Nations Avenue, Ermita, Manila** in accordance with Section 29 of the revised IRR of RA No. 9184. Bids will be opened in the presence of the bidders' representatives who choose to attend at the address below. Late bids shall not be accepted.

Interested bidders may send their request to participate in the Bid Opening through email. Kindly indicate the company name, full name, designation, and e-mail addresses of the company representatives and send the request to [bacsec@insurance.gov.ph](mailto:bacsec@insurance.gov.ph).

10. Each Bidder shall submit one (1) original and three (3) copies of the First and second components of its bids. Three-envelope system.
11. The **Insurance Commission** reserves the right to reject any and all bids, declare a failure of bidding, or not award the contract at any time prior to contract award in accordance with 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:

**MR. ARTURO S. TRINIDAD II**

BAC Chairperson

Insurance Commission

1071 United Nations Avenue, Ermita, Manila

8523-8461 local 107

Email address : bacsec@insurance.gov.ph

You may visit the following websites:

For downloading of Bidding Documents:

<https://www.insurance.gov.ph/public-bidding/>

*14 August 2023*

ORIGINAL SIGNED  
**ARTURO S. TRINIDAD II**  
BAC Chairperson

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

## 1. Scope of Bid

The Procuring Entity, **INSURANCE COMMISSION** wishes to receive Bids for the **Procurement of Comprehensive Maintenance for the Enhanced Licensing System (ELS) and Oracle Database, Business Intelligence and Weblogic Application and Servers for the Insurance Commission**, with **Project Reference No. 2023-08-241**.

The Procurement Project (referred to herein as "Project") is composed of one (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 **2023 Special Account in the General Fund 151** in the amount of **Five Million Pesos (Php5,000,000.00), inclusive of 12% VAT**.

2.2. The source of funding is:

**The 2023 Special Account in the General Fund 151.**

## 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 **ITB** 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 exceeding those allowed under the rules may participate pursuant to:
- i. When a Treaty or International or Executive Agreement as provided in Section 4 of the RA No. 9184 and its 2016 revised IRR allow foreign bidders to participate;
  - ii. Citizens, corporations, or associations of a country, included in the list issued by the GPPB, the laws or regulations of which grant reciprocal rights or privileges to citizens, corporations, or associations of the Philippines;
  - iii. When the Goods sought to be procured are not available from local suppliers; or
  - iv. When there is a need to prevent situations that defeat competition or restrain trade.
- 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. For the procurement of Non-expendable Supplies and Services: The Bidder must have completed a single contract that is similar to this Project, equivalent to at least fifty percent (50%) of the ABC.
  - b. For procurement where the Procuring Entity has determined, after the conduct of market research, that imposition of either (a) or (b) will likely result to failure of bidding or monopoly that will defeat the purpose of public bidding: the Bidder should comply with the following requirements:
    - i. Completed at least two (2) similar contracts, the aggregate amount of which should be equivalent to at least fifty percent (50%) in the case of non-expendable supplies and services or twenty-five percent (25%) in the case of expendable supplies of the ABC for this Project; and
    - ii. The largest of these similar contracts must be equivalent to at least half of the percentage of the ABC as required above
- 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 **Subcontracting is not allowed**.

- 7.2. Subcontracting of any portion of the Project does not relieve the Supplier of any liability or obligation under the Contract. The Supplier will be responsible for the acts, defaults, and negligence of any subcontractor, its agents, servants, or workmen as fully as if these were the Supplier's own acts, defaults, or negligence, or those of its agents, servants, or workmen.

## 8. Pre-Bid Conference

The Procuring Entity will hold a pre-bid conference for this Project on the specified date and time and either at its physical address as indicated in paragraph 6 of the **ITB**.

## 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 **ITB**, 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 five (5) years from the date of submission and receipt of bids, a contract similar to the Project** 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 **ITB** shall not be accepted.
- 11.4. For Foreign-funded Procurement, a ceiling may be applied to bid prices provided the conditions are met under Section 31.2 of the 2016 revised IRR of RA No. 9184.

## 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 **Section VII (Technical Specifications)**.
  - 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 **Section VII (Technical Specifications)**.



### 13. Bid and Payment Currencies

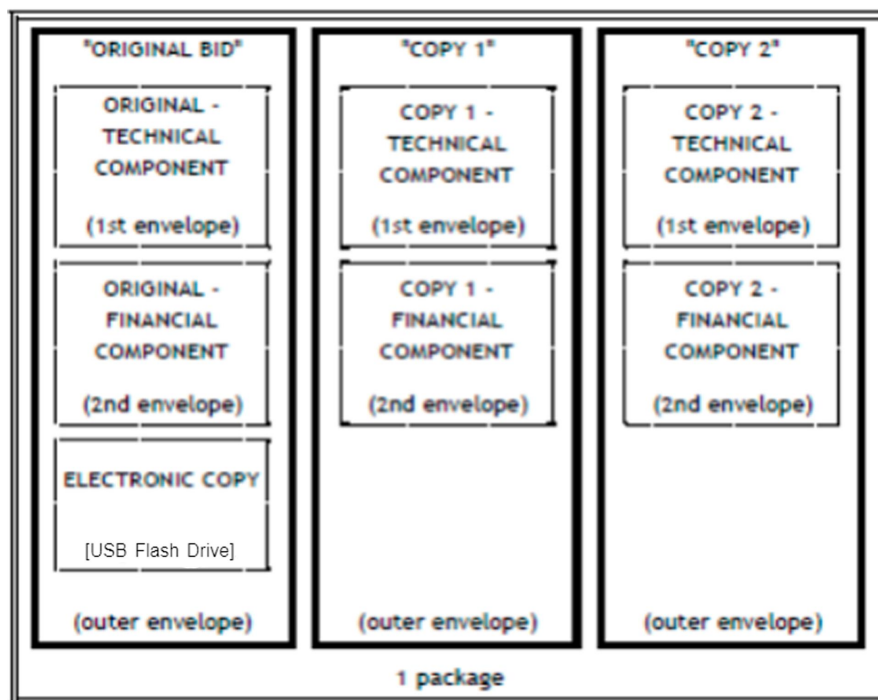
- 13.1. For Goods that the Bidder will supply from outside the Philippines, the bid prices may be quoted in the local currency or tradeable currency accepted by the BSP at the discretion of the Bidder. However, for purposes of bid evaluation, Bids denominated in foreign currencies, shall be converted 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 **Philippine Peso**.

### 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 until **06 January 2024 (120 calendar days from the opening of bids)**. 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 (1) original and three (3) copies of the technical and financial components of its bid as illustrated below:



In addition, all documents comprising the Technical and Financial Components shall be electronically scanned and recorded in a USB flash drive [USB Flash Drive]. This USB Flash Drive shall be marked as “ELECTRONIC COPY” and shall be put inside the sealed envelope labelled “ORIGINAL BID”.

All submissions must be contained and sealed in one (1) package.

Each sealed Bid shall be labelled as follows:

<p><b>&lt;HEADER/LABEL&gt;</b> ATTENTION : <b>THE BAC CHAIRPERSON</b> <b>INSURANCE COMMISSION</b> <b>1071 United Nations Avenue, Ermita Manila, 1000</b></p> <p>NAME OF PROJECT : <u>PROCUREMENT OF COMPREHENSIVE MAINTENANCE SERVICE AGREEMENT FOR THE ENHANCED LICENSING SYSTEM (ELS) AND ORACLE DB, BI AND WEBLOGIC APPLICATIONS AND SERVERS FOR THE INSURANCE COMMISSION</u></p> <p>PROJECT REFERENCE NO. : <b><u>2023-08-241</u></b></p> <p>DATE AND TIME OF OPENING BIDS : <u>BIDDER'S NAME AND SIGNATURE</u></p> <p>ADDRESS : <u>BIDDER'S ADDRESS</u></p> <p><i>DO NOT OPEN BEFORE DATE AND TIME OF OPENING OF BIDS</i></p>
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**<HEADER/LABEL>** shall be:

1. **“ORIGINAL BID PLUS TWO COPIES INSIDE”** – for the bid package
2. **“ORIGINAL BID”** – for the 1<sup>st</sup> outer envelope
  1. **“ORIGINAL - TECHNICAL COMPONENT”** – for the 1<sup>st</sup> envelope inside the 1<sup>st</sup> outer envelope
  2. **“ORIGINAL - FINANCIAL COMPONENT”** – for the 2<sup>nd</sup> envelope inside the 1<sup>st</sup> outer envelope
  3. **“ELECTRONIC COPY”** – USB Flash Drive containing the electronic copy of both Technical and Financial Component
3. **“COPY 1”** – for the 2<sup>nd</sup> outer envelope
  - a. **“COPY 1 - TECHNICAL COMPONENT”** – for the 1<sup>st</sup> envelope inside the 2<sup>nd</sup> outer envelope
  - b. **“COPY 1- FINANCIAL COMPONENT”** – for the 2<sup>nd</sup> envelope inside the 2<sup>nd</sup> outer envelope
4. **“COPY 2”** – for the 3<sup>rd</sup> outer envelope

- a. **“COPY 2 - TECHNICAL COMPONENT”** – for the 1<sup>st</sup> envelope inside the 3<sup>rd</sup> outer envelope
- b. **“COPY 2- FINANCIAL COMPONENT”** – for the 2<sup>nd</sup> envelope inside the 3<sup>rd</sup> outer envelope

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 ITB**.

## **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 **ITB**. The Bidders' representatives who are present shall sign a register evidencing their attendance.

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 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 may be. 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 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**

- 20.1. 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

ITB Clause											
5.3	<p>For this purpose, contracts similar to the Project shall be:</p> <p style="margin-left: 40px;">a. Procurement of Comprehensive Maintenance for the Enhanced Licensing System (ELS) and Oracle Database, Business Intelligence and Weblogic Application and Servers for the Insurance Commission</p> <p style="margin-left: 40px;">b. Completed within <b>Five (5) years</b> prior to the deadline for the submission and receipt of bids.</p>										
7.1	Subcontracting is not allowed										
12	The price of the Goods shall be quoted DDP 1071 United Nations, Ermita Manila or the applicable International Commercial Terms (INCOTERMS) for this Project.										
14.1	<p>The bid security shall be in any of the following forms issued in favor of the Insurance Commission (IC):</p> <table border="1" style="width: 100%; border-collapse: collapse; margin: 10px 0;"> <thead> <tr> <th style="width: 25%; text-align: center;">Approved Budget for the Contract (P)</th> <th style="width: 25%; text-align: center;">Amount Cash, Cashier's/ Manager's Check, Bank Draft/ Guarantee/ Irrevocable Letter of Credit (2%)</th> <th style="width: 25%; text-align: center;">Surety Bond callable upon demand issued by a surety or insurance company duly certified by the Insurance Commission (5%)</th> <th style="width: 25%; text-align: center;">Bid Securing Declaration (Pursuant to GPPB Resolution No. 03-2012)</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">5,000,000.00</td> <td style="text-align: center;">100,000.00</td> <td style="text-align: center;">250,000.00</td> <td style="text-align: center;">No required amount</td> </tr> </tbody> </table> <p>If the Bid Security is in the form of cashier's/manager's check, the payee shall be <b>"INSURANCE COMMISSION"</b>.</p>			Approved Budget for the Contract (P)	Amount Cash, Cashier's/ Manager's Check, Bank Draft/ Guarantee/ Irrevocable Letter of Credit (2%)	Surety Bond callable upon demand issued by a surety or insurance company duly certified by the Insurance Commission (5%)	Bid Securing Declaration (Pursuant to GPPB Resolution No. 03-2012)	5,000,000.00	100,000.00	250,000.00	No required amount
Approved Budget for the Contract (P)	Amount Cash, Cashier's/ Manager's Check, Bank Draft/ Guarantee/ Irrevocable Letter of Credit (2%)	Surety Bond callable upon demand issued by a surety or insurance company duly certified by the Insurance Commission (5%)	Bid Securing Declaration (Pursuant to GPPB Resolution No. 03-2012)								
5,000,000.00	100,000.00	250,000.00	No required amount								
19.3	<p>The project would be awarded in one (1) lot:</p> <table border="1" style="width: 100%; border-collapse: collapse; margin: 10px 0;"> <thead> <tr> <th style="width: 10%; text-align: center;">Lot No.</th> <th style="width: 15%; text-align: center;">Quantity</th> <th style="width: 55%; text-align: center;">Item/Description</th> <th style="width: 20%; text-align: center;">Approved Budget for the Contract</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;">1</td> <td style="text-align: center;">lot</td> <td style="text-align: center;">Php5,000,000.00</td> </tr> </tbody> </table>			Lot No.	Quantity	Item/Description	Approved Budget for the Contract	1	1	lot	Php5,000,000.00
Lot No.	Quantity	Item/Description	Approved Budget for the Contract								
1	1	lot	Php5,000,000.00								

20.2

The Bidder with the Lowest Calculated Bid shall submit copies of the following documents:

1. Latest income and business tax returns filed and paid through the BIR Electronic Filing and Payment System (eFPS)

**NOTE:** Latest Income Tax Return (ITR) shall refer to the ITR for the year 2022 filed in 2023. For new establishments which have no annual ITR yet, it shall refer to the most recent quarter's ITR. Further, for areas where e-filing is yet to be implemented, a Certification to that effect from BIR main office is acceptable. Latest Business Tax Returns shall refer to the Value Added Tax (VAT) and/or Percentage Tax Returns, whichever is applicable covering the previous six (6) months prior to the submission of the post qualification documents. For those with less than six (6) months of operations, this refers to the monthly business tax returns filed to date. Bidders filing both the VAT and Percentage Tax Returns must submit both returns.

Quarterly Value Added Tax (VAT) Returns – BIR Form No. 2550Q covering the 4th quarter of CY 2022 and the 1st quarter of CY 2023.	and/or	Quarterly Percentage Tax Returns - BIR Form No. 2551Q covering the 4th quarter of CY 2022 and the 1st quarter of CY 2023.
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2. Bureau of Internal Revenue (BIR) Certificate of Registration or BIR Form 2303
3. Certificate from the manufacturer that the bidder is a certified reseller or partner of the proposed brand of laptop computers
4. Certification from the manufacturer that the bidder is certified to provide technical support for the proposed brand of laptop computers.

Failure of the supplier, declared as Single/Lowest Calculated Bid (S/LCB), to duly submit the above requirements or a finding against the veracity of such shall be ground for forfeiture of the bid security and disqualify the Supplier for award.

***N.B. Documents submitted during post-qualification as part of post-qualification documents , must be certified by the authorized representative to be true copy/ies from the original.***

# **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 prior to 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.

## 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 specifications at no extra cost to the Procuring Entity in accordance with the Generic Procurement Manual. In addition to tests in the **SCC, Section IV (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**

## Special Conditions of Contract

GCC Clause	
1	<p>The Project Site is:</p> <p><b>INSURANCE COMMISSION</b> 1071 United Nations Avenue Ermita, Manila</p> <p><b>Delivery and Documents –</b></p> <p>For purposes of the Contract, “EXW,” “FOB,” “FCA,” “CIF,” “CIP,” “DDP” and other trade terms used to describe the obligations of the parties shall have the meanings assigned to them by the current edition of INCOTERMS published by the International Chamber of Commerce, Paris. The Delivery terms of this Contract shall be as follows:</p> <p><i>[For Goods supplied from within the Philippines, state:]</i> “The delivery terms applicable to this Contract are delivered to the Insurance Commission’s Head Office at UN Avenue, Ermita, Manila, Philippines. Risk and title will pass from the Supplier to the Procuring Entity upon receipt and final acceptance of the Goods at their final destination.”</p> <p>Delivery of the Goods shall be made by the Supplier in accordance with the terms specified in Section VI (Schedule of Requirements).</p> <p>For purposes of this Clause the Procuring Entity’s Representative at the Project Site are <b>MANFRED ACE G. RAZON</b> of the Information Systems Division.</p> <p><b>Incidental Services –</b></p> <p>The Supplier is required to provide all the following services, including additional services, if any, specified in Section VI. Schedule of Requirements:</p> <ol style="list-style-type: none"> <li>a. performance or supervision of on-site assembly and/or start-up of the supplied Goods;</li> <li>b. furnishing of tools required for assembly and/or maintenance of the supplied Goods;</li> <li>c. furnishing of a detailed operations and maintenance manual for each appropriate unit of the supplied Goods;</li> <li>d. performance or supervision or maintenance and/or repair of the supplied Goods, for a period of time agreed by the parties, provided that this service shall not relieve the Supplier of any warranty obligations under this Contract; and</li> <li>e. training of the Procuring Entity’s personnel, at the Supplier’s plant and/or on-site, in assembly, start-up, operation, maintenance, and/or repair of the supplied Goods.</li> </ol>

	<p>f. The Contract price for the Goods shall include the prices charged by the Supplier for incidental services and shall not exceed the prevailing rates charged to other parties by the Supplier for similar services.</p> <p><b>Intellectual Property Rights –</b></p> <p>The Supplier shall indemnify the Procuring Entity against all third-party claims of infringement of patent, trademark, or industrial design rights arising from use of the Goods or any part thereof.</p>
2.2	Payment shall be made in accordance with Section VI. Schedule of Requirements and upon completion of the contract and submission of complete documentary requirements in accordance with prevailing accounting and auditing rules and regulations
4	<p>The inspections and tests that will be conducted by the:</p> <ol style="list-style-type: none"> <li>1. Inspection conducted by the Internal Control Unit of the Procuring Entity; and</li> <li>2. IS Personnel of the Insurance Commission</li> </ol>
5.1	The warranty is specified in Section VI. Schedule of Requirements.

# Section VI. Schedule of Requirements

The delivery schedule expressed as days stipulates hereafter as delivery period, which is the date of delivery to the project site.

## 1. The delivery schedule shall be as indicated below:

Item	Description of the Project	Qty	U/M	Delivered, Weeks/Months
1	Procurement of Comprehensive Maintenance Service Agreement for the Enhanced Licensing System (ELS) and Oracle DB, BI and WebLogic Applications and Servers	1	lot	Delivery of the Comprehensive Maintenance Service Agreement shall start <b>Upon receipt of the Notice to Proceed (NTP)</b>

## 2. Service Level Agreement/Warranty Certificate

The winning bidder must submit an implementation Schedule indicating the required activities and the date of implementation, Sales/Service Invoice, and Service Level Agreement (SLA)/Warranty Certificate.

## 3. Liquidated Damages

- i. Liquidated Damages will be imposed if the delivery of the required documents and/or any deliverables will not be accomplished by the winning bidder after thirty (30) days upon receipt of the Notice to Proceed.
- ii. The applicable rate for the liquidated damages is one tenth (1/10) of one (1) percent of the total bid price of the winning bidder for every day of delay.

## 4. Payment Terms

Payment shall be made per project milestone after issuance of Certificate of Final Acceptance by the Procuring Entity subject to the submission of complete supporting documents:

Project Milestone	Description	Activities	Delivered, Weeks/Months	% Payment of Contract Price
1	Development & Implementation of Data Warehouse using ELS Data Source	<ul style="list-style-type: none"> <li>• Requirement Gathering</li> <li>• Creation of Database Object Synonyms</li> <li>• Development of Processes</li> <li>• Data Loading Process and Validation</li> </ul>	Within Sixty (60) Calendar Days from receipt of Notice to Proceed	30%
2	ELS Security Maintenance Part 1	<ul style="list-style-type: none"> <li>• Implementation of Security Directives enumerated</li> <li>• Updated User Manual</li> <li>• Submission of step-by-step video and audio recordings of all the essential administration tasks covered in the KT sessions</li> </ul>	Within Ninety (90) Calendar days from receipt of Notice to Proceed	20%
3	ELS Security Maintenance Part 2	<ul style="list-style-type: none"> <li>• Creation of playbooks to automate the following administration tasks</li> <li>• Conduct of Penetration Testing</li> </ul>	Within Sixty (60) Calendar days from completion of Project Milestone 2	20%
4	ELS Support Maintenance	<ul style="list-style-type: none"> <li>• Daily Support and Maintenance service for ELS, BI modules, etc</li> </ul>	Before issuance of Certificate of Final Acceptance	15%
5	ELS Application Support Services (Operations)	<ul style="list-style-type: none"> <li>• Data Cleansing and Data Corrections</li> <li>• Data Reconciliation</li> <li>• Data Migration, etc.</li> </ul>	Before issuance of Certificate of Final Acceptance	15%

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

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**Name of Company**

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**Address**

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**Signature over Printed Name (Duly authorized to sign the Bid)**

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**Telephone/Fax Number**

*Insurance Commission*



# Section VII. Technical Specifications

Insurance Commission

# Technical Specifications

ITEM NO.	COMPREHENSIVE MAINTENANCE SERVICE AGREEMENT FOR THE ENHANCED LICENSING SYSTEM (ELS) AND ORACLE DATABASE, BUSINESS INTELLIGENCE AND WEBLOGIC APPLICATIONS AND SERVERS	QTY	U/M
		1	LOT
I	<b>OVERVIEW</b>		
	<p>The Insurance Commission (IC) is a national government agency attached to the Department of Finance (DOF), directed to regulate the insurance, pre-need, and HMO industries under Republic Act (R.A.) No. 10607, otherwise known as the “Amended Insurance Code, R. A. 9829, otherwise known as the “Pre-Need Code,” and Executive Order No. 192 (s. 2015), respectively</p> <p>The Insurance Commission (IC) has been implementing the Enhanced Licensing System (ELS) since 01 February 2016 by virtue of IC Circular Letter No. 2016 – 04.</p> <p>The ELS is used by the various IC Legal Services Group divisions, particularly the Licensing Division; one of the major front-line service divisions of the IC. The division uses the ELS to handle the Licensing of Insurance Agents and Issuance of Certificate of Authority for Insurance Companies, among others.</p> <p>ELS aims to ensure the uniform and efficient processing of license registrations for all IC regulated entities (Insurance Companies, Agents, Underwriters, Solicitors, Counselors, Adjusters, and Actuaries) and provide real-time organized publicly accessible information on any of the IC’s regulated entities.</p>		
II	<b>OBJECTIVE</b>		
	a) To provide the necessary and timely resolution of system related issues in the day-to-day operations of ELS. This is a proactive measure that ensures availability of support resources for uninterrupted business operation in case of any system related failure;		
	b) To provide application support which shall cover the following: modification of software product after delivery to correct faults, improve performance or other attributes, correct latent faults in the software before they become effective faults and services to provide bug fixes and program optimization as the need arises;		
	c) To provide knowledge transfer training;		
	d) To develop and implement a Data Warehouse using ELS as Data Source;		
	e) To provide a library of documented faults/issues and the corresponding corrective measures applied;		
	f) To prevent future disruptions due to an inability to detect performance problems early;		

ITEM NO.	COMPREHENSIVE MAINTENANCE SERVICE AGREEMENT FOR THE ENHANCED LICENSING SYSTEM (ELS) AND ORACLE DATABASE, BUSINESS INTELLIGENCE AND WEBLOGIC APPLICATIONS AND SERVERS	QTY	U/M
		1	LOT
	g) To guarantee that the fixes, system enhancement and other maintenance services will not affect the performance of the existing ELS;		
III	<b>PROJECT SCOPE</b>		
	The project shall cover the delivery of services for configuration, monitoring, testing, and implementation of the Enhanced Licensing System (ELS), which includes but not limited to the following:		
	a) Enhanced Licensing System (ELS)		
	b) Oracle Databases (ICDB, ICOBI)		
	c) Oracle Business Intelligence (OBI) Repository		
	d) Oracle Business Intelligence Server		
	e) Oracle Business Intelligence Application		
	f) WebLogic Server being used on both ELS and OBI.		
IV	<b>DETAILED SCOPE OF WORK FOR THE SECURITY, SUPPORT, AND MAINTENANCE</b>		
	Applications support and maintenance is an important element to ensure the availability and security of critical applications and systems. With the proactive approach, the availability of the applications, restoration of your data and application, and minimal disruption in the event of hardware failure can be guaranteed.		
	1. ELS Support Maintenance		
	The support and maintenance services will cover the following modules:		
	a) System Administration;		
	b) Company Application;		
	c) Company Renewal;		
	d) Agent Application		
	e) Agent Renewal;		
	f) Underwriter Application;		
	g) Underwriter Renewal;		

ITEM NO.	COMPREHENSIVE MAINTENANCE SERVICE AGREEMENT FOR THE ENHANCED LICENSING SYSTEM (ELS) AND ORACLE DATABASE, BUSINESS INTELLIGENCE AND WEBLOGIC APPLICATIONS AND SERVERS	QTY	U/M
		1	LOT
	h) Actuary Application;		
	i) Actuary Renewal;		
	j) Adjuster Application;		
	k) Adjuster Renewal;		
	l) Counselor Application;		
	m) Counselor Renewal;		
	n) Solicitor Application;		
	o) Solicitor Renewal;		
	p) Branch Application;		
	q) Agency Application;		
	r) License Evaluation and Approval;		
	s) License Printing;		
	t) Order of Payment;		
	u) Cashier;		
	v) License Issuance;		
	w) Legal System Administration;		
	x) Legal Adjudication;		
	y) Legal Administrative;		
	z) Legal Mediation;		
	aa)Legal Regulation;		
	bb)Modification;		
	cc)Negative List;		
	dd)License Cancellation;		
	ee)License Expiration;		
	ff) Assignment;		
	gg)Escalation;		
	hh)User Profile; and		
	ii) Data Migration Tool.		
	2. ELS Application Support Services (Operations)		

ITEM NO.	COMPREHENSIVE MAINTENANCE SERVICE AGREEMENT FOR THE ENHANCED LICENSING SYSTEM (ELS) AND ORACLE DATABASE, BUSINESS INTELLIGENCE AND WEBLOGIC APPLICATIONS AND SERVERS	QTY	U/M
		1	LOT
	a) Data Cleansing and Data Corrections		
	<ul style="list-style-type: none"> <li>To perform cancellation of OOP</li> </ul>		
	<ul style="list-style-type: none"> <li>To perform correction of Agent's and License data</li> </ul>		
	<ul style="list-style-type: none"> <li>To perform the changing of License Valid Dates</li> </ul>		
	b) Data Reconciliation		
	<ul style="list-style-type: none"> <li>To perform merging of Duplicate Agent data (e.g., Agent with Multiple TIN and/or SSS)</li> </ul>		
	c) Data Migration		
	<ul style="list-style-type: none"> <li>To perform migration of Agent and Company licenses to the ELS</li> </ul>		
	<ul style="list-style-type: none"> <li>To perform correction of data discrepancies - submitted migration file vs existing data on ELS database</li> </ul>		
	d) Enhancement of Printing of License Module including the batch printing of license and license certificate with the provisions of printer machine		
	3. Development & Implementation of Data Warehouse using ELS Data Source		
	<ul style="list-style-type: none"> <li>Requirements Gathering Confirmation (User requests, Data Retention, Priority Schema)</li> </ul>		
	<ul style="list-style-type: none"> <li>ELS Data Exploration, Creation of Database Object Synonyms &amp; Creation of Database Link</li> </ul>		
	<ul style="list-style-type: none"> <li>Creation of Staging Area Schema (Logical and Physical Design), Data Definition Language</li> </ul>		
	<ul style="list-style-type: none"> <li>Develop &amp; Test Extract-Transform-Load (ETL) - From ELS DB to Staging Processes (Oracle PL/SQL)</li> </ul>		
	<ul style="list-style-type: none"> <li>Creation of DW Schema (Logical and Physical Design), Data Definition Language</li> </ul>		
	<ul style="list-style-type: none"> <li>Develop &amp; Test Extract-Transform-Load (ETL) - From Staging Area to DW Schema Processes</li> </ul>		
	<ul style="list-style-type: none"> <li>Data Loading Process and Validation</li> </ul>		
	4. ELS Security Maintenance		
	a) Provide access to ELS source code versioning control		
	b) Creation of playbooks to automate the following administration tasks		

ITEM NO.	COMPREHENSIVE MAINTENANCE SERVICE AGREEMENT FOR THE ENHANCED LICENSING SYSTEM (ELS) AND ORACLE DATABASE, BUSINESS INTELLIGENCE AND WEBLOGIC APPLICATIONS AND SERVERS	QTY	U/M
		1	LOT
	<ul style="list-style-type: none"> <li>Backup of BI Repository (.rpd), NQSConfig.ini, InstanceConfig.xml, Catalog (Archived), Catalog FS, Security Realms</li> </ul>		
	<ul style="list-style-type: none"> <li>Restoration of Oracle BI objects</li> </ul>		
	<ul style="list-style-type: none"> <li>ELS database backup</li> </ul>		
	c) Implementation of the following directives to configure the security defenses of ELS in web browsers:		
	<ul style="list-style-type: none"> <li>Always use "HTTPS" for all pages;</li> </ul>		
	<ul style="list-style-type: none"> <li>Set "HSTS" to prevent HTTP downgrades attacks;</li> </ul>		
	<ul style="list-style-type: none"> <li>Set "X-XSS-Protection" to prevent cross-site scripting attacks;</li> </ul>		
	<ul style="list-style-type: none"> <li>Add "X-Content-Type-Options" to prevents browsers from interpreting files as a different MIME type, which can lead to XSS attacks;</li> </ul>		
	<ul style="list-style-type: none"> <li>Add "X-Frame-Options" to prevents the site from being embedded within an iframe, which can protect against clickjacking attacks;</li> </ul>		
	<ul style="list-style-type: none"> <li>Set "Content-Security-Policy" to reduce the risk of XSS and other code injection attacks;</li> </ul>		
	<ul style="list-style-type: none"> <li>Add a "Referrer-Policy" to control the value of the Referrer header, which can help prevent information leakage;</li> </ul>		
	<ul style="list-style-type: none"> <li>List a "Permissive CORS policy" to configure the server to return appropriate "Access-Control-Allow-Origin" header to restrict cross-origin requests; and</li> </ul>		
	<ul style="list-style-type: none"> <li>Use secure cookies; set the "Secure" and "HttpOnly" flags on cookies to prevent theft and tampering.</li> </ul>		
	d) Enhancement of ELS security hygiene. Quarterly reports for the following must be submitted during the quarterly meetings set with the project team:		
	<ul style="list-style-type: none"> <li>Apply the latest patches and updates for the operating system, web engine servers, and web application framework, including all libraries and plugins</li> </ul>		
	<ul style="list-style-type: none"> <li>Regular software updates and patch management</li> </ul>		
	<ul style="list-style-type: none"> <li>Strong password policies for all servers (including non-prod) and implement multi-factor authentication, if applicable</li> </ul>		
	<ul style="list-style-type: none"> <li>Enable auditing and logging, configure roles and permissions, and implement a least privilege principle</li> </ul>		
	<ul style="list-style-type: none"> <li>Limit the number of database users and regularly review and revoke access for inactive users</li> </ul>		

ITEM NO.	COMPREHENSIVE MAINTENANCE SERVICE AGREEMENT FOR THE ENHANCED LICENSING SYSTEM (ELS) AND ORACLE DATABASE, BUSINESS INTELLIGENCE AND WEBLOGIC APPLICATIONS AND SERVERS	QTY	U/M
		1	LOT
	<ul style="list-style-type: none"> <li>Establish a regular backup and recovery process and test it quarterly;</li> </ul>		
	<ul style="list-style-type: none"> <li>Develop a concise disaster recovery planning manual</li> </ul>		
	<ul style="list-style-type: none"> <li>Implement real-time monitoring and alerting to detect and respond to security incidents</li> </ul>		
	<ul style="list-style-type: none"> <li>Regular security audits and vulnerability assessments.</li> </ul>		
	e) Updated User Manual (Within Ninety (90) Calendar days from receipt of Notice to Proceed)		
	f) Conduct penetration testing after implementing sections C and D above to serve as a baseline, develop a remediation plan, and validate implementation with a retest.		
	g) Submission of step-by-step video and audio recordings of all the essential administration tasks covered in the KT sessions such as:		
	i. Start/Shutdown of VMs (Weblogic, OBI services)		
	ii. Start/Shutdown of Prod servers		
	iii. ODA Administration tasks		
	iv. Manual Oracle DB schema dump		
	v. Manual uploading of documents		
	vi. Manual backup procedures for BI Repository (.rpd), NQSConfig.ini, InstanceConfig.xml, Catalog (Archived), Catalog FS, Security Realms		
	vii. Restoring Oracle BI and Oracle DB		
V	<b>TECHNICAL SUPPORT</b>		
	1. Support & Maintenance Project Roles		
	a. The following project roles will be provided to the Insurance Commission to perform the various activities for the duration of this engagement. Please note that an individual can play one-or-more roles.		
	i. Project Manager		
	ii. ELS Programmer and Administrator		

ITEM NO.	COMPREHENSIVE MAINTENANCE SERVICE AGREEMENT FOR THE ENHANCED LICENSING SYSTEM (ELS) AND ORACLE DATABASE, BUSINESS INTELLIGENCE AND WEBLOGIC APPLICATIONS AND SERVERS	QTY	U/M
		1	LOT
	iii. Oracle Database Developer and Administrator		
	iv. Oracle Business Intelligence Developer and Administrator		
	v. Oracle Data Warehouse Architect and Implementer		
	vi. Project Admin Assistant and Coordinator		
	b. The Service Provider shall provide qualified and experienced personnel to provide technical support during the maintenance period.		
	c. The Service Provider must have qualified and experienced IT personnel who will provide services in the enhancement, optimization, bug fixes and implementation of ELS.		
	2. Working Arrangements, Facilities and Equipment		
	a. Working Arrangements		
	i. Support services can be done through on-call, email and on-site.		
	ii. On-site support of at least one personnel from the Service Provider should be available from Monday to Friday (From 8am to 5pm)		
	iii. On-call support is available beyond 5pm from Monday to Friday. On-call response time is 1 hour.		
	iv. Submission of Service Reports, especially when issues/faults are encountered. Submission must be within 24 hours of the resolution of the fault/issue.		
	v. Insurance Commission shall provide remote and LAN access on ELS, Oracle DB, Oracle BI and Oracle WebLogic Servers, for the entire duration of the engagement indicated in the Scope of Work.		
	b. Confidentiality		
	The support and maintenance provider shall treat as confidential all information obtained from Insurance Commission in relation to this engagement and shall not divulge such information without Insurance Commission prior written consent.		
	c. Hardware Components		



ITEM NO.	COMPREHENSIVE MAINTENANCE SERVICE AGREEMENT FOR THE ENHANCED LICENSING SYSTEM (ELS) AND ORACLE DATABASE, BUSINESS INTELLIGENCE AND WEBLOGIC APPLICATIONS AND SERVERS	QTY	U/M
		1	LOT
	Must do the following activities to assist IC in the support and maintenance services:		
	(a) To report to ORACLE problems on the hardware components such as disk, storage, router, hub, rack, network, etc.		
	(b) To report to ORACLE Hardware / Operating System (OS) Break-Fix and Maintenance Services		
	(c) Any form of Hardware Configuration and Set-up		
VI	<b>REGULAR REPORTING</b>		
	1. The Service Provider must submit a regular report based on the agreed schedule with IC.		
	2. The IC and the Service Provider must have a regularly set meeting, which both parties shall agree upon the exact schedule using the online video conferencing. Schedule of the meeting would be determined through an agreement with the Insurance Commission and the Service Provider.		
VII	<b>PROFESSIONAL SERVICES</b>		
	1. The Service Provider must have qualified and experienced IT personnel who will provide services in the enhancement, optimization, bug fixes and implementation of ELS		
	2. Resume/CV of the Systems Programmer and BI Programmer must be submitted to the IC Information Systems Division prior to contract signing. The Resume/CV should indicate the employment history and projects handled.		
	3. Once the contract has been signed, no replacement shall be allowed except for justifiable reasons. In case of non-compliance, a penalty shall be applied as defined in the contract.		
VIII	<b>SITE PREPARATION</b>		
	1. The Service Provider shall provide all necessary workstations, printers, peripherals, computer and office supplies for the use of their team during the duration of this agreement. The IC will provide the location of the project team's workstations.		
	2. The Service Provider shall ensure that all files, codes and programs are backed-up every month. An Authorized IC Representative from the Information Systems Division or Information Technology Division must sign documentation of backup.		

ITEM NO.	COMPREHENSIVE MAINTENANCE SERVICE AGREEMENT FOR THE ENHANCED LICENSING SYSTEM (ELS) AND ORACLE DATABASE, BUSINESS INTELLIGENCE AND WEBLOGIC APPLICATIONS AND SERVERS	QTY	U/M
		1	LOT
	3. The Service Provider's team is expected to conform to IC's office rules and regulations, i.e. proper office attire, etc.		
	4. The Service Provider shall ensure the absolute confidentiality of all information, documents or records acquired in the course of or as an incident to this Project. It shall not use or disclose to any person, firm or corporation any information hereto acquired for its benefit or to the detriment of IC. A Non-Disclosure Agreement must be signed together with the Contract of the Project.		
IX	<b>APPROVED BUDGET FOR THE CONTRACT (ABC)</b>		
	The Comprehensive Maintenance Service Agreement will cost <b>FIVE MILLION PESOS (PHP5,000,000.00)</b> inclusive of all taxes, such as, but not limited to, value-added tax, local taxes, and other fiscal levies or government charges.		
X	<b>PROJECT DURATION</b>		
	The duration of the Project is <b>TWELVE (12)</b> months.		

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

Insurance Commission

# Checklist of Technical and Financial Documents

## I. TECHNICAL COMPONENT ENVELOPE

### *Class "A" Documents*

#### Legal Documents

- (a) Valid PhilGEPS Registration Certificate (Platinum Membership) (all pages);  
**or**
- (b) Registration certificate from Securities and Exchange Commission (SEC), Department of Trade and Industry (DTI) for sole proprietorship, or Cooperative Development Authority (CDA) for cooperatives or its equivalent document,  
**and**
- (c) Mayor's or Business permit issued by the city or municipality where the principal place of business of the prospective bidder is located, or the equivalent document for Exclusive Economic Zones or Areas;  
**and**
- (d) Tax clearance per E.O. No. 398, s. 2005, as finally reviewed and approved by the Bureau of Internal Revenue (BIR).

#### Technical Documents

- (e) 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**
- (f) 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**
- (g) 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**
- (h) Conformity with the Technical Specifications, which may include production/delivery schedule, manpower requirements, and/or after-sales/parts, if applicable; **and**

- (i) 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

- (j) The Supplier's audited financial statements, showing, among others, the Supplier's total and current assets and liabilities, stamped "received" by the BIR or its duly accredited and authorized institutions, for the preceding calendar year which should not be earlier than two (2) years from the date of bid submission; **and**
- (k) 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**

- (l) 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.

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

- (m) *[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.
- (n) Certification from the DTI if the Bidder claims preference as a Domestic Bidder or Domestic Entity.

**II. FINANCIAL COMPONENT ENVELOPE**

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

## BID FORMS

FORM NO.	FORM TITLE
IC Form No. 1	BID FORM
IC Form No. 1-A	DETAILED BID PRICE SCHEDULE
IC Form No. 2	FINANCIAL DOCUMENTS FOR ELIGIBILITY
IC Form No. 3	LIST OF ALL ONGOING GOVERNMENT & PRIVATE CONTRACTS INCLUDING CONTRACTS AWARDED BUT NOT YET STARTED
IC Form No. 4	STATEMENT IDENTIFYING THE BIDDER'S SINGLE LARGEST COMPLETED CONTRACT SIMILAR TO THE CONTRACT TO BE BID WITHIN THE LAST FIVE (5) YEARS
IC Form No. 5	JOINT VENTURE AGREEMENT
IC Form No. 6	CONFORMITY WITH SECTION VI (SCHEDULE OF REQUIREMENTS) AND SECTION VII (TECHNICAL SPECIFICATIONS)
IC Form No. 7	OMNIBUS SWORN STATEMENT
IC Form No. 8	BID SECURING DECLARATION
IC Form No. 9	PERFORMANCE SECURING DECLARATION

**Bid Form for the Procurement of Goods**  
***[shall be submitted with the Bid]***

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**BID FORM**

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

Project Identification No. : \_\_\_\_\_

To: The BAC Chairperson  
Insurance Commission  
G/F IC Bldg., 1071 United Nations Avenue  
Ermita, Manila

Gentlemen and/or Ladies:

Having examined the Philippine Bidding Documents (PBDs) including the Supplemental or Bid Bulletin Numbers ***[insert numbers]***, the receipt of which is hereby duly acknowledged, we, the undersigned, offer to ***[supply/deliver/perform]*** ***[description of the Goods]*** in conformity with the said PBDs for the sum of ***[total Bid amount in words and figures]*** or the total calculated bid price, as evaluated and corrected for computational errors, and other bid modifications in accordance with the Price Schedules attached herewith and made part of this Bid. The total bid price includes the cost of all taxes, such as, but not limited to: ***[specify the applicable taxes, e.g. (i) value added tax (VAT), (ii) income tax, (iii) local taxes, and (iv) other fiscal levies and duties]***, which are itemized herein or in the Price Schedules,

If our Bid is accepted, we undertake:

- a. to deliver the goods in accordance with the delivery schedule specified in the Schedule of Requirements of the Philippine Bidding Documents (PBDs);
- b. to provide a performance security in the form, amounts, and within the times prescribed in the PBDs;
- c. to abide by the Bid Validity Period specified in the PBDs and it shall remain binding upon us at any time before the expiration of that period.

[Insert this paragraph if Foreign-Assisted Project with the Development Partner:  
Commissions or gratuities, if any, paid or to be paid by us to agents relating to this Bid, and to contract execution if we are awarded the contract, are listed below:

Name and address  
Amount and Purpose  
of of agent Currency  
Commission or gratuity


(if none, state "None") ]

Until a formal Contract is prepared and executed, this Bid, together with your written acceptance thereof and your Notice of Award, shall be binding upon us.

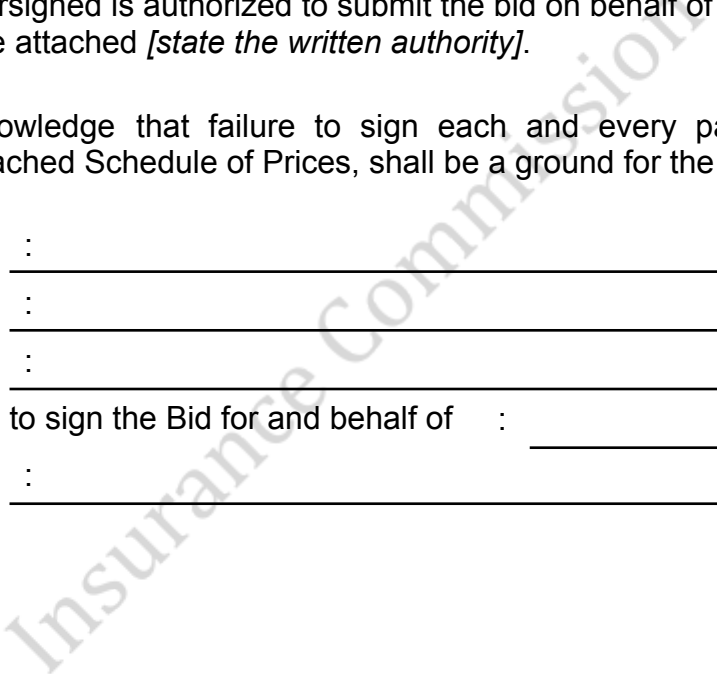
We understand that you are not bound to accept the Lowest Calculated Bid or any Bid you may receive.

We certify/confirm that we comply with the eligibility requirements pursuant to the PBDs.

The undersigned is authorized to submit the bid on behalf of *[name of the bidder]* as evidenced by the attached *[state the written authority]*.

We acknowledge that failure to sign each and every page of this Bid Form, including the attached Schedule of Prices, shall be a ground for the rejection of our bid.

Name : \_\_\_\_\_  
 Legal Capacity : \_\_\_\_\_  
 Signature : \_\_\_\_\_  
 Duly authorized to sign the Bid for and behalf of : \_\_\_\_\_  
 Date : \_\_\_\_\_





**For Goods Offered From Within the Philippines  
Detailed Bid Price Schedule**

Date: \_\_\_\_\_  
Project ID No: \_\_\_\_\_

**Project :** Procurement of Comprehensive Maintenance for the Enhanced Licensing System (ELS) and Oracle Database, Business Intelligence and Weblogic Application and Servers for the Insurance Commission

**Code:**  
Date of Bidding: \_\_\_\_\_  
Time of Bidding: \_\_\_\_\_

(Supplier's Name/Address/Tel. No.)

**For Goods Offered From Within the Philippines**

LOT NO.	DESCRIPTION	QTY	U/M	Unit Price	Total Price
1	Procurement of Comprehensive Maintenance for the Enhanced Licensing System (ELS) and Oracle Database, Business Intelligence and Weblogic Application and Servers for the Insurance Commission	1	lot		
<b>TOTAL BID PRICE, Pesos :</b>					
<b>Plus 12% RVAT :</b>					
<b>TOTAL BID PRICE PHP :</b>					

**Total Amount in Words :**

**(PhP )**

Name of Bidder \_\_\_\_\_ ITB Number \_\_\_\_\_. Page \_\_\_\_ of \_\_\_\_.

\_\_\_\_\_  
Signature/Date  
Authorized Official/Position

**Financial Documents For Eligibility Check**

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- Summary of the Applicant Supplier’s/Distributor’s/Manufacturer’s assets and liabilities on the basis of the attached income tax return and audited financial statement, stamped “RECEIVED” by the Bureau of Internal Revenue (BIR) or BIR authorized collecting agent, for the immediately preceding year and a certified copy of Schedule of Fixed Assets particularly the list of construction equipment.

		Year 20
1.	Total Assets	
2.	Current Assets	
3.	Total Liabilities	
4.	Current Liabilities	
5.	Net Worth (1-3)	
6.	Net Working Capital (2-4)	

- The **Net Financial Contracting Capacity (NFCC)** based on the above data is computed as follows:

NFCC = 15 (current assets– current liabilities) minus value of all outstanding works under ongoing contracts including awarded contracts yet to be started

NFCC = PhP \_\_\_\_\_

Herewith attached are certified true copies of the income tax return and audited financial statement: stamped “RECEIVED” by the BIR or BIR authorized collecting agent for the immediately preceding year and NFCC Computation and/or certificate of commitment from a licensed bank to extend a credit line.

Submitted by:

\_\_\_\_\_  
Name of Supplier / Distributor / Manufacturer

\_\_\_\_\_  
Signature of Authorized Representative

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

**NOTE:**

*If Partnership or Joint Venture, each Partner or Member Firm of Joint Venture shall submit the above requirements.*

**IC Form No. 3**

**List of all Ongoing Government & Private Contracts including Contracts Awarded but not yet Started**

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

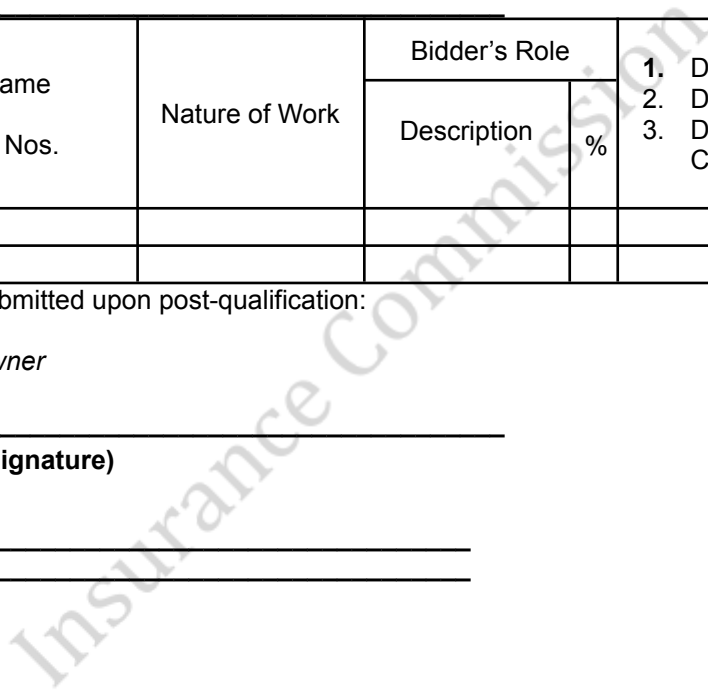
Name of Contract/ Project Cost	1. Owner's Name 2. Address 3. Telephone Nos.	Nature of Work	Bidder's Role		1. Date Awarded 2. Date Started 3. Date of Completion	% of Accomplishment		Value of Outstanding Works / Undelivered Portion
			Description	%		Planned	Actual	
<u>Government</u>								

**Note:** The following documents shall be submitted upon post-qualification:

1. *Notice of Award and/or Contract*
2. *Notice to Proceed issued by the owner*

Submitted by : \_\_\_\_\_  
**(Printed Name & Signature)**

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



IC Form No. 4

**STATEMENT OF SINGLE (1) LARGEST COMPLETED CONTRACT OF SIMILAR NATURE WITHIN THE LAST FIVE (5) YEARS FROM DATE OF SUBMISSION AND RECEIPT OF BIDS AMOUNTING TO AT LEAST FIFTY PERCENT (50%) OF THE APPROVED BUDGET FOR THE CONTRACT (ABC)**

**OR**

**STATEMENT OF AT LEAST TWO (2) CONTRACTS OF SIMILAR NATURE WITHIN THE LAST FIVE (5) YEARS FROM THE DATE OF SUBMISSION AND RECEIPT OF BIDS, THE AGGREGATE OF WHICH SHOULD BE EQUIVALENT TO AT LEAST FIFTY PERCENT (50%) OF THE ABC, AND THE LARGEST OF THESE SIMILAR CONTRACTS MUST BE EQUIVALENT TO AT LEAST TWENTY FIVE PERCENT (25%) OF THE ABC (25%) OF THE ABC**

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

Name of Contract	1. Owner's Name 2. Address 3. Telephone Nos.	Nature of Work	Bidder's Role		1. Amount at Award 2. Amount at Completion 3. Duration	1. Date Awarded 2. Contract Effectivity 3. Date Completed
			Description	%		
Government						

**Note:** Any of the following documents shall be submitted upon post-qualification:

- a) Copy of End User's Acceptance; or
- b) Official Receipt/s; or
- c) Sales Invoice

**Submitted by:** \_\_\_\_\_  
 (Printed Name & Signature)

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

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

**Joint Venture Agreement**

**KNOW ALL MEN BY THESE PRESENTS:**

That this JOINT VENTURE AGREEMENT is entered into By and Between \_\_\_\_\_, of legal age, (civil status), owner/proprietor of \_\_\_\_\_ and a resident of \_\_\_\_\_.

and –

of \_\_\_\_\_, of legal age, (civil status), owner/proprietor of \_\_\_\_\_ a resident of \_\_\_\_\_.

That both parties agree to join together their manpower, equipment, and what is needed to facilitate the Joint Venture to participate in the Eligibility, Bidding and Undertaking of the here-under stated project to be conducted by the Insurance Commission.

- |                    |                        |
|--------------------|------------------------|
| 1. NAME OF PROJECT | <u>CONTRACT AMOUNT</u> |
|--------------------|------------------------|

That both parties agree to be jointly and severally liable for the entire assignment.

That both parties agree that \_\_\_\_\_ and/or \_\_\_\_\_ shall be the Official Representative of the Joint Venture, and is granted full power and authority to do, execute and perform any and all acts necessary and/or to represent the Joint Venture in the bidding as fully and effectively and the Joint Venture may do and if personally present with full power of substitution and revocation.

That this Joint Venture Agreement shall remain in effect only for the above stated Project until terminated by both parties.

Done this \_\_\_\_\_ day of \_\_\_\_\_, in the year of our Lord 20\_\_.

**ACKNOWLEDGEMENT**

REPUBLIC OF THE PHILIPPINES )  
\_\_\_\_\_ )S.S.

BEFORE ME, a Notary Public for and in \_\_\_\_\_, Philippines, this  
\_\_\_\_\_ day of \_\_\_\_\_, 20\_\_, personally appeared:

<u>NAME</u>	<u>CTC NO.</u>	<u>ISSUED AT/ON</u>
_____	_____	_____
_____	_____	_____

known to me and known to be the same person who executed the foregoing instrument consisting of \_\_\_\_\_ ( ) pages, including the page whereon the acknowledgment is written and acknowledged before me that the same is his free and voluntary act and deed and that of the Corporation he represents.

WITNESS MY HAND AND NOTARIAL SEAL, at the place and on the date first above written.

Notary Public  
Until 31 December 20\_\_  
PTR No. \_\_\_\_\_  
Issued at: \_\_\_\_\_  
Issued on: \_\_\_\_\_  
TIN No. \_\_\_\_\_

Doc. No. \_\_\_\_\_  
Page No. \_\_\_\_\_  
Book No. \_\_\_\_\_  
Series of 20\_\_.

**IC Form No. 6**

**Conformity with Section VI (Schedule of Requirements) and  
Section VII (Technical Specifications)**

(Name of Bidder) hereby undertakes that it shall **COMPLY** with the general requirements stated in Sections VI (Schedule of Requirements) and Section VII (Technical Specifications).

\_\_\_\_\_  
Name and Signature of Authorized Official

\_\_\_\_\_  
Position

\_\_\_\_\_  
Date

REPUBLIC OF THE PHILIPPINES)  
\_\_\_\_\_ ) S.S.

**ACKNOWLEDGMENT**

BEFORE ME, a Notary Public for and in \_\_\_\_\_, Philippines, this \_\_\_ day of \_\_\_\_\_, 20\_\_\_, personally appeared:

Name	Government-Issued ID & No.	Issued on	Issued at
(SUPPLIER)			

known to me and to me known to be the same person who executed the foregoing instrument consisting of \_\_\_\_\_ (\_\_\_) pages, including the page whereon this Acknowledgment is written, all pages signed by both parties and their instrumental witnesses, and they acknowledged before me that the same is their free and voluntary act and deed and that of the Corporation they represent.

WITNESS MY HAND AND NOTARIAL SEAL, on the date and place first above written.

Notary Public

Doc. No. \_\_\_\_\_;  
Page No. \_\_\_\_\_;  
Book No. \_\_\_\_\_;  
Series of 20\_\_\_\_.

## Omnibus Sworn Statement (Revised)

*[shall be submitted with the Bid]*

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REPUBLIC OF THE PHILIPPINES )

CITY/MUNICIPALITY OF \_\_\_\_\_ ) S.S.

### AFFIDAVIT

I, [Name of Affiant], of legal age, [Civil Status], [Nationality], and residing at [Address of Affiant], after having been duly sworn in accordance with law, do hereby depose and state that:

1. *[Select one, delete the other:]*

*[If a sole proprietorship:]* I am the sole proprietor or authorized representative of [Name of Bidder] with office address at [address of Bidder];

*[If a partnership, corporation, cooperative, or joint venture:]* I am the duly authorized and designated representative of [Name of Bidder] with office address at [address of Bidder];

2. *[Select one, delete the other:]*

*[If a sole proprietorship:]* As the owner and sole proprietor, or authorized representative of [Name of Bidder], I have full power and authority to do, execute and perform any and all acts necessary to participate, submit the bid, and to sign and execute the ensuing contract for [Name of the Project] of the [Name of the Procuring Entity], as shown in the attached duly notarized Special Power of Attorney;

*[If a partnership, corporation, cooperative, or joint venture:]* I am granted full power and authority to do, execute and perform any and all acts necessary to participate, submit the bid, and to sign and execute the ensuing contract for [Name of the Project] of the [Name of the Procuring Entity], as shown in the attached [state title of attached document showing proof of authorization (e.g., duly notarized Secretary's Certificate, Board/Partnership Resolution, or Special Power of Attorney, whichever is applicable)];



3. [Name of Bidder] is not “blacklisted” or barred from bidding by the Government of the Philippines or any of its agencies, offices, corporations, or Local Government Units, foreign government/foreign or international financing institution whose blacklisting rules have been recognized by the Government Procurement Policy Board, **by itself or by relation, membership, association, affiliation, or controlling interest with another blacklisted person or entity as defined and provided for in the Uniform Guidelines on Blacklisting;**

4. Each of the documents submitted in satisfaction of the bidding requirements is an authentic copy of the original, complete, and all statements and information provided therein are true and correct;

5. [Name of Bidder] is authorizing the Head of the Procuring Entity or its duly authorized representative(s) to verify all the documents submitted;

6. *[Select one, delete the rest:]*

*[If a sole proprietorship:]* The owner or sole proprietor is not related to the Head of the Procuring Entity, Procurement Agent if engaged, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

*[If a partnership or cooperative:]* None of the officers and members of *[Name of Bidder]* is related to the Head of the Procuring Entity, Procurement Agent if engaged, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

*[If a corporation or joint venture:]* None of the officers, directors, and controlling stockholders of *[Name of Bidder]* is related to the Head of the Procuring Entity, Procurement Agent if engaged, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

7. *[Name of Bidder]* complies with existing labor laws and standards; and

8. *[Name of Bidder]* is aware of and has undertaken the responsibilities as a Bidder in compliance with the Philippine Bidding Documents, which includes:

- a. Carefully examining all of the Bidding Documents;
- b. Acknowledging all conditions, local or otherwise, affecting the implementation of the Contract;
- c. Making an estimate of the facilities available and needed for the contract to be bid, if any; and
- d. Inquiring or securing Supplemental/Bid Bulletin(s) issued for the *[Name of the Project]*.

9. *[Name of Bidder]* did not give or pay directly or indirectly, any commission, amount, fee, or any form of consideration, pecuniary or otherwise, to any person or official, personnel or representative of the government in relation to any procurement project or activity.

**10. In case advance payment was made or given, failure to perform or deliver any of the obligations and undertakings in the contract shall be sufficient grounds to constitute criminal liability for Swindling (Estafa) or the commission of fraud with unfaithfulness or abuse of confidence through misappropriating or converting any payment received by a person or entity under an obligation involving the duty to deliver certain goods or services, to the prejudice of the public and the government of the Philippines pursuant to Article 315 of Act No. 3815 s. 1930, as amended, or the Revised Penal Code.**

IN WITNESS WHEREOF, I have hereunto set my hand this \_\_\_ day of \_\_\_, 20\_\_ at \_\_\_\_\_, Philippines.

*[Insert NAME OF BIDDER OR ITS  
AUTHORIZED REPRESENTATIVE]*

*[Insert signatory's legal capacity]*

Affiant

**[Jurat]**

*[Format shall be based on the latest Rules on Notarial Practice]*

## Bid Securing Declaration Form

*[shall be submitted with the Bid if bidder opts to provide this form of bid security]*

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REPUBLIC OF THE PHILIPPINES)

CITY OF \_\_\_\_\_) S.S.

### BID SECURING DECLARATION

Project Identification No.: *[Insert number]*

To: *[Insert name and address of the Procuring Entity]*

I/We, the undersigned, declare that:

1. I/We understand that, according to your conditions, bids must be supported by a Bid Security, which may be in the form of a Bid Securing Declaration.
2. I/We accept that: (a) I/we will be automatically disqualified from bidding for any procurement contract with any procuring entity for a period of two (2) years upon receipt of your Blacklisting Order; and, (b) I/we will pay the applicable fine provided under Section 6 of the Guidelines on the Use of Bid Securing Declaration, within fifteen (15) days from receipt of the written demand by the procuring entity for the commission of acts resulting to the enforcement of the bid securing declaration under Sections 23.1(b), 34.2, 40.1 and 69.1, except 69.1(f), of the IRR of RA No. 9184; without prejudice to other legal action the government may undertake.
3. I/We understand that this Bid Securing Declaration shall cease to be valid on the following circumstances:
  - a. Upon expiration of the bid validity period, or any extension thereof pursuant to your request;
  - b. I am/we are declared ineligible or post-disqualified upon receipt of your notice to such effect, and (i) I/we failed to timely file a request for reconsideration or (ii) I/we filed a waiver to avail of said right; and
  - c. I am/we are declared the bidder with the Lowest Calculated Responsive Bid, and I/we have furnished the performance security and signed the Contract.

IN WITNESS WHEREOF, I/We have hereunto set my/our hand/s this \_\_\_\_ day of [month]  
[year] at [place of execution].

*[Insert NAME OF BIDDER OR ITS AUTHORIZED  
REPRESENTATIVE]*

*[Insert signatory's legal capacity]*

Affiant

**[Jurat]**

*[Format shall be based on the latest Rules on Notarial Practice]*

Insurance Commission

**Performance Securing Declaration (Revised)**  
***[if used as an alternative performance security but it is not required to be submitted with the Bid, as it shall be submitted within ten (10) days after receiving the Notice of Award]***

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REPUBLIC OF THE PHILIPPINES)  
CITY OF \_\_\_\_\_ ) S.S.

**PERFORMANCE SECURING DECLARATION**

Invitation to Bid: [Insert Reference Number indicated in the Bidding Documents]

To: [Insert name and address of the Procuring Entity]

I/We, the undersigned, declare that:

1. I/We understand that, according to your conditions, to guarantee the faithful performance by the supplier/distributor/manufacturer/contractor/consultant of its obligations under the Contract, I/we shall submit a Performance Securing Declaration within a maximum period of ten (10) calendar days from the receipt of the Notice of Award prior to the signing of the Contract.
2. I/We accept that: I/we will be automatically disqualified from bidding for any procurement contract with any procuring entity for a period of one (1) year for the first offense, or two (2) years **for the second offense**, upon receipt of your Blacklisting Order if I/We have violated my/our obligations under the Contract;
3. I/We understand that this Performance Securing Declaration shall cease to be valid upon:
  - a. issuance by the Procuring Entity of the Certificate of Final Acceptance, subject to the following conditions:
    - i. Procuring Entity has no claims filed against the contract awardee;
    - ii. It has no claims for labor and materials filed against the contractor; and
    - iii. Other terms of the contract; or
  - b. replacement by the winning bidder of the submitted PSD with a performance security in any of the prescribed forms under Section 39.2 of the 2016 revised IRR of RA No. 9184 as required by the end-user.

**IN WITNESS WHEREOF**, I/We have hereunto set my/our hand/s this \_\_\_\_ day of [month] [year] at [place of execution].

*[Insert NAME OF BIDDER OR ITS  
AUTHORIZED REPRESENTATIVE]  
[Insert signatory's legal capacity]  
Affiant*

**[Jurat]**  
*[Format shall be based on the latest Rules on Notarial Practice]*

Insurance Commission

