

PHILIPPINE BIDDING DOCUMENTS

Procurement of Services of a Research/Survey Company to Conduct the 2023 PHLPost Customer Satisfaction Survey

Sixth Edition

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:

- a. 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.
- b. 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.
- c. 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.

- d. 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.
- e. 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.
- f. 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 project or consulting services. A Procurement Project shall be described, detailed, and scheduled in the Project Procurement Management Plan prepared by the agency which shall be consolidated in the procuring entity's Annual Procurement Plan. (GPPB Circular No. 06-2019 dated 17 July 2019)

PSA – Philippine Statistics Authority.

SEC – Securities and Exchange Commission.

SLCC – Single Largest Completed Contract.

Supplier – refers to a citizen, or any corporate body or commercial company duly organized and registered under the laws where it is established, habitually established in business and engaged in the manufacture or sale of the merchandise or performance of the general services covered by his bid. (Item 3.8 of GPPB Resolution No. 13-2019, dated 23 May 2019). Supplier as used in these Bidding Documents may likewise refer to a distributor, manufacturer, contractor, or consultant.

UN – United Nations.

Section I. Invitation to Bid

Notes on the Invitation to Bid

The Invitation to Bid (**IB**) provides information that enables potential Bidders to decide whether to participate in the procurement at hand. The IB shall be posted in accordance with Section 21.2 of the 2016 revised IRR of RA No. 9184.

Apart from the essential items listed in the Bidding Documents, the IB should also indicate the following:

- a. The date of availability of the Bidding Documents, which shall be from the time the IB is first advertised/posted until the deadline for the submission and receipt of bids;
- b. The place where the Bidding Documents may be acquired or the website where it may be downloaded;
- c. The deadline for the submission and receipt of bids; and
- d. Any important bid evaluation criteria (*e.g.*, the application of a margin of preference in bid evaluation).

The IB should be incorporated in the Bidding Documents. The information contained in the IB must conform to the Bidding Documents and in particular to the relevant information in the Bid Data Sheet.



INVITATION TO BID
FOR THE PROCUREMENT OF SERVICES OF A RESEARCH/SURVEY COMPANY TO
CONDUCT 2023 PHLPost CUSTOMER SATISFACTION SURVEY

1. The **Philippine Postal Corporation**, through the CY 2023 Corporate Budget approved by the Board of Directors of this Corporation, intends to apply the sum of **Six Million Pesos (Php 6,000,000.00)** being the Approved Budget for the Contract (ABC) to payments under the contract for the Procurement of Services of a Research/Survey Company to Conduct 2023 PHLPost Customer Satisfaction Survey. Bids received in excess of the ABC shall be automatically rejected at bid opening.
2. The Philippine Postal Corporation now invites bids for the Procurement of Services of a Research/Survey Company to Conduct 2023 PHLPost Customer Satisfaction Survey. Delivery of the goods is required within Eleven (11) months. Bidders should have completed, within three (3) years from the date of submission and receipt of bids, a contract similar to the Project. The description of an eligible bidder is contained in the Bidding Documents, particularly, in Section II (Instructions to Bidders).
3. Bidding will be conducted through open competitive bidding procedures using a non-discretionary “*pass/fail*” criterion as specified in the 2016 revised Implementing Rules and Regulations (IRR) of Republic Act (RA) No. 9184.

Bidding is open to all interested bidders, whether local or foreign, subject to the conditions for eligibility provided in the 2016 revised IRR of RA No. 9184.

4. Prospective Bidders may obtain further information from the Philippine Postal Corporation and inspect the Bidding Documents at the address given below starting **April 19, 2023** to **May 09, 2023** during office hours and on **May 10, 2023** until 9:00 A.M.
5. A complete set of Bidding Documents may be acquired by interested Bidders starting **April 19, 2023** to **May 09, 2023** during office hours and on **May 10, 2023** until 9:00 A.M. from the given address and website(s) below upon payment of the applicable fee for the Bidding Documents, pursuant to the latest Guidelines issued by the GPPB, in the amount of **Php 10,000.00**.
6. The Philippine Postal Corporation will hold a Pre-Bid Conference on **April 26, 2023** at **2:00 P.M.**, at the Conference Room, Office of the Board of Directors, 3rd Floor, Post Office Main Building, Magallanes Drive, Liwasang Bonifacio, Barangay 659-A, Ermita 1000, Manila and/or through video conferencing or webcasting via ZOOM Cloud Meetings application, which shall be open to prospective bidders.
7. Bids must be duly received by the BAC Secretariat at the office address indicated below on or before **9:00 A.M. of May 10, 2023**. 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 **May 10, 2023** at **10:30** A.M. at the Conference Room, Office of the Board of Directors, 3rd Floor, Post Office Main Building, Magallanes Drive, Liwasang Bonifacio, Barangay 659-A, Ermita 1000, Manila. Bids will be opened in the presence of the bidders' representatives who choose to attend the activity.
10. The Philippine Postal Corporation 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.
11. For further information, please refer to:
ATTY. BENJIE S. YOTOKO, CPA
Chairperson, Bids and Awards Committee (BAC)
Thru:
Bids and Awards Committee Secretariat
3rd Floor Mezzanine, Post Office Main Bldg.
Magallanes Drive, Liwasang Bonifacio
Barangay 659-A, Ermita 1000 Manila
Tel./Fax No. (02) 8527-3824
Email Address: phlpostbac@yahoo.com
FB Page: @baccentralpostoffice
12. You may visit www.phlpost.gov.ph for downloading of Bidding Documents.

(Signed)
ATTY. BENJIE S. YOTOKO, CPA
BAC Chairperson

Section II. Instructions to Bidders

Notes on the Instructions to Bidders

This Section on the Instruction to Bidders (ITB) provides the information necessary for bidders to prepare responsive bids, in accordance with the requirements of the Procuring Entity. It also provides information on bid submission, eligibility check, opening and evaluation of bids, post-qualification, and on the award of contract.

1. Scope of Bid

The Procuring Entity, PHILIPPINE POSTAL CORPORATION, wishes to receive Bids for the *Procurement of Services of a Research/Survey Company to Conduct 2023 PHLPost Customer Satisfaction Survey*, with identification number *PPC-BAC-2023-12*.

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 for CY 2023 in the amount of **Six Million Pesos (Php 6,000,000.00)**.

2.2. The source of funding is: Corporate Budget approved by the Board of Directors of the Philippine Postal Corporation.

3. Bidding Requirements

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

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

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

4. Corrupt, Fraudulent, Collusive, and Coercive Practices

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

5. Eligible Bidders

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

5.2. Foreign ownership 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.
- 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*.

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 at the **Conference Room, Office of the Board of Directors, 3rd Floor, Post Office Main Building, Magallanes Drive, Liwasang Bonifacio, Barangay 659-A, Ermita 1000, Manila** and/or through videoconferencing/webcasting as indicated in paragraph 6 of the **IB**.

9. Clarification and Amendment of Bidding Documents

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

10. Documents comprising the Bid: Eligibility and Technical Components

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

11. Documents comprising the Bid: Financial Component

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

14. Bid Security

- 14.1. The Bidder shall submit a Bid Securing Declaration¹ 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**.

¹ In the case of Framework Agreement, the undertaking shall refer to entering into contract with the Procuring Entity and furnishing of the performance security or the performance securing declaration within ten (10) calendar days from receipt of Notice to Execute Framework Agreement.

- 14.2. The Bid and bid security shall be valid until *120 calendar days* from bid opening. Any Bid not accompanied by an acceptable bid security shall be rejected by the Procuring Entity as non-responsive.

15. Sealing and Marking of Bids

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

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

NOTE: *The Post Office-BAC is requesting all bidders to submit **Three (3) copies**.*

16. Deadline for Submission of Bids

- 16.1. The Bidders shall submit on the specified date and time at its physical address at the **BAC Secretariat Office**, 3rd Floor, Mezzanine, Post Office Main Building, Magallanes Drive, Liwasang Bonifacio, Barangay 659-A, Ermita 1000, Manila, as indicated in paragraph 7 of the **IB**.

17. Opening and Preliminary Examination of Bids

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

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

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

18. Domestic Preference

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

19. Detailed Evaluation and Comparison of Bids

- 19.1. The Procuring BAC shall immediately conduct a detailed evaluation of all Bids rated "*passed*," using non-discretionary pass/fail criteria. The BAC shall

consider the conditions in the evaluation of Bids under Section 32.2 of the 2016 revised IRR of RA No. 9184.

- 19.2. If the Project allows partial bids, bidders may submit a proposal on any of the lots or items, and evaluation will be undertaken on a per lot or item basis, as the case maybe. In this case, the Bid Security as required by **ITB** Clause 15 shall be submitted for each lot or item separately.
- 19.3. The descriptions of the lots or items shall be indicated in **Section VII (Technical Specifications)**, although the ABCs of these lots or items are indicated in the **BDS** for purposes of the NFCC computation pursuant to Section 23.4.2.6 of the 2016 revised IRR of RA No. 9184. The NFCC must be sufficient for the total of the ABCs for all the lots or items participated in by the prospective Bidder.
- 19.4. The Project shall be awarded as follows:

Option 1 – One Project having several items that shall be awarded as one contract.
- 19.5. Except for bidders submitting a committed Line of Credit from a Universal or Commercial Bank in lieu of its NFCC computation, all Bids must include the NFCC computation pursuant to Section 23.4.1.4 of the 2016 revised IRR of RA No. 9184, which must be sufficient for the total of the ABCs for all the lots or items participated in by the prospective Bidder. For bidders submitting the committed Line of Credit, it must be at least equal to ten percent (10%) of the ABCs for all the lots or items participated in by the prospective Bidder.

20. Post-Qualification

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

21. Signing of the Contract

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

Section III. Bid Data Sheet

Notes on the Bid Data Sheet

The Bid Data Sheet (BDS) consists of provisions that supplement, amend, or specify in detail, information, or requirements included in the ITB found in Section II, which are specific to each procurement.

This Section is intended to assist the Procuring Entity in providing the specific information in relation to corresponding clauses in the ITB and has to be prepared for each specific procurement.

The Procuring Entity should specify in the BDS information and requirements specific to the circumstances of the Procuring Entity, the processing of the procurement, and the bid evaluation criteria that will apply to the Bids. In preparing the BDS, the following aspects should be checked:

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

Bid Data Sheet

ITB Clause			
5.3	For this purpose, contracts similar to the Project shall be: <ul style="list-style-type: none"> a. <i>Customer Satisfaction Survey Services</i> b. completed within three (3) years prior to the deadline for the submission and receipt of bids. 		
7.1	<i>Subcontracting is not allowed.</i>		
12	The price of the Goods shall be quoted DDP [<i>state place of destination</i>] or the applicable International Commercial Terms (INCOTERMS) for this Project.		
14.1	The bid security shall be in the form of a Bid Securing Declaration, or any of the following forms and amounts: <ul style="list-style-type: none"> a. The amount of not less than <i>two percent (2%) of ABC</i>, if bid security is in cash, cashier's/manager's check, bank draft/guarantee or irrevocable letter of credit; or b. The amount of not less than <i>five percent (5%) of ABC</i> if bid security is in Surety Bond. 		
19.3	Item/Description	Quantity	ABC (in Php)
	<i>Services of a Research/Survey Company to Conduct 2023 PHLPost Customer Satisfaction Survey</i>	One (1) Lot	6,000,000.00
20.2	<i>List licenses and permits relevant to the Project and the corresponding law requiring it. The BAC may require the concern bidder to submit additional documents/requirements.</i>		
21.2	<i>List here any additional contract documents relevant to the Project that may be required by existing laws and/or the Procuring Entity.</i>		

Section IV. General Conditions of Contract

Notes on the General Conditions of Contract

The General Conditions of Contract (GCC) in this Section, read in conjunction with the Special Conditions of Contract in Section V and other documents listed therein, should be a complete document expressing all the rights and obligations of the parties.

Matters governing performance of the Supplier, payments under the contract, or matters affecting the risks, rights, and obligations of the parties under the contract are included in the GCC and Special Conditions of Contract.

Any complementary information, which may be needed, shall be introduced only through the Special 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

Notes on the Special Conditions of Contract

Similar to the BDS, the clauses in this Section are intended to assist the Procuring Entity in providing contract-specific information in relation to corresponding clauses in the GCC found in Section IV.

The Special Conditions of Contract (SCC) complement the GCC, specifying contractual requirements linked to the special circumstances of the Procuring Entity, the Procuring Entity's country, the sector, and the Goods purchased. In preparing this Section, the following aspects should be checked:

- a. Information that complements provisions of the GCC must be incorporated.
- b. Amendments and/or supplements to provisions of the GCC as necessitated by the circumstances of the specific purchase, must also be incorporated.

However, no special condition which defeats or negates the general intent and purpose of the provisions of the GCC should be incorporated herein.

Special Conditions of Contract

GCC Clause					
1	<p><i>The following provisions will be included to this Contract:</i></p> <p>1. <i>Any query/ concern to the supplier as to the implementation of this Contract shall be coursed through the following contact persons on the details provided:</i></p> <table border="1" style="margin-left: 40px; border-collapse: collapse;"> <tr> <td style="width: 40%; padding: 5px;"> Principal: Name: Office: Contact No: </td> <td style="width: 60%;"></td> </tr> <tr> <td style="padding: 5px;"> Alternate: Name: Office: Contact No: </td> <td></td> </tr> </table> <p><i>Any notice made by PHLPost to the foregoing shall be deemed as notice to the Supplier.</i></p> <p>2. <i>The Supplier agrees to indemnify, defend and hold the Procuring Entity free and harmless from and against any and all claims, suits, actions or liabilities for injury or death of any person, or for loss or damage of property, arising from Supplier’s performance of its obligation under this Contract including the improvements introduced or to be introduced therein or from any activity, work or thing performed by Supplier, its employees, crews, technicians, contractor/servicer in connection with the performace of this Contract.</i></p> <p>3. <i>The Supplier hereby warrants that it has not offered or paid directly or indirectly any government official, agency or instrumentality or employee thereof, any consideration, commission, or gift to secure this Contract. Any violation of this warranty shall constitute sufficient ground for the rescission or cancellation of this Contract without prejudice to the filing of civil or criminal action under the Anti-Graft Law and other applicable laws against the violator(s).</i></p> <p>4. <i>Both parties acknowledge that this Contract constitutes the entire agreement between them and the terms and conditions in the Contract shall completely supersede all other prior understandings, previous communications or contracts, oral or written, between the parties relating to the subject matter thereof.</i></p> <p>5. <i>In case of litigation arising from or in connection with this contract, venue of action shall solely be in the appropriate court of Manila.</i></p> <p>Delivery and Documents –</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>	Principal: Name: Office: Contact No:		Alternate: Name: Office: Contact No:	
Principal: Name: Office: Contact No:					
Alternate: Name: Office: Contact No:					

[For Goods supplied from abroad, state:] “The delivery terms applicable to the Contract are DDP delivered *[indicate place of destination]*. In accordance with INCOTERMS.”

[For Goods supplied from within the Philippines, state:] “The delivery terms applicable to this Contract are delivered in Metro Manila. Risk and title will pass from the Supplier to the Procuring Entity upon receipt and final acceptance of the Goods at their final destination.”

Delivery of the Goods shall be made by the Supplier in accordance with the terms specified in Section VI (Schedule of Requirements).

For purposes of this Clause the Procuring Entity’s Representative at the Project Site is *the Acting Manager, Corporate Planning Department, Office of the APMG for Management Support Services, Philippine Postal Corporation.*

Incidental Services –

The Supplier is required to provide all of the following services, including additional services, if any, specified in Section VI. Schedule of Requirements:
Select appropriate requirements and delete the rest.

- a. performance or supervision of on-site assembly and/or start-up of the supplied Goods;
- b. furnishing of tools required for assembly and/or maintenance of the supplied Goods;
- c. furnishing of a detailed operations and maintenance manual for each appropriate unit of the supplied Goods;
- 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

- 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.
- f. *[Specify additional incidental service requirements, as needed.]*

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.

Spare Parts –

The Supplier is required to provide all of the following materials, notifications, and information pertaining to spare parts manufactured or distributed by the Supplier:

- a. such spare parts as the Procuring Entity may elect to purchase from the Supplier, provided that this election shall not relieve the Supplier of any warranty obligations under this Contract; and

The spare parts and other components required are listed in **Section VI (Schedule of Requirements)** and the cost thereof are included in the contract price.

The Supplier shall carry sufficient inventories to assure ex-stock supply of consumable spare parts or components for the Goods for a period of three years.

Spare parts or components shall be supplied as promptly as possible, but in any case, within 1 month of placing the order.

Packaging –

The Supplier shall provide such packaging of the Goods as is required to prevent their damage or deterioration during transit to their final destination, as indicated in this Contract. The packaging shall be sufficient to withstand, without limitation, rough handling during transit and exposure to extreme temperatures, salt and precipitation during transit, and open storage. Packaging case size and weights shall take into consideration, where appropriate, the remoteness of the Goods' final destination and the absence of heavy handling facilities at all points in transit.

The packaging, marking, and documentation within and outside the packages shall comply strictly with such special requirements as shall be expressly provided for in the Contract, including additional requirements, if any, specified below, and in any subsequent instructions ordered by the Procuring Entity.

The outer packaging must be clearly marked on at least four (4) sides as follows:

- Name of the Procuring Entity
- Name of the Supplier
- Contract Description
- Final Destination
- Gross weight
- Any special lifting instructions
- Any special handling instructions
- Any relevant HAZCHEM classifications

	<p>A packaging list identifying the contents and quantities of the package is to be placed on an accessible point of the outer packaging if practical. If not practical the packaging list is to be placed inside the outer packaging but outside the secondary packaging.</p> <p>Transportation –</p> <p>Where the Supplier is required under Contract to deliver the Goods CIF, CIP, or DDP, transport of the Goods to the port of destination or such other named place of destination in the Philippines, as shall be specified in this Contract, shall be arranged and paid for by the Supplier, and the cost thereof shall be included in the Contract Price.</p> <p>Where the Supplier is required under this Contract to transport the Goods to a specified place of destination within the Philippines, defined as the Project Site, transport to such place of destination in the Philippines, including insurance and storage, as shall be specified in this Contract, shall be arranged by the Supplier, and related costs shall be included in the contract price.</p>
	<p>Where the Supplier is required under Contract to deliver the Goods CIF, CIP or DDP, Goods are to be transported on carriers of Philippine registry. In the event that no carrier of Philippine registry is available, Goods may be shipped by a carrier which is not of Philippine registry provided that the Supplier obtains and presents to the Procuring Entity certification to this effect from the nearest Philippine consulate to the port of dispatch. In the event that carriers of Philippine registry are available but their schedule delays the Supplier in its performance of this Contract the period from when the Goods were first ready for shipment and the actual date of shipment the period of delay will be considered force majeure.</p> <p>The Procuring Entity accepts no liability for the damage of Goods during transit other than those prescribed by INCOTERMS for DDP deliveries. In the case of Goods supplied from within the Philippines or supplied by domestic Suppliers risk and title will not be deemed to have passed to the Procuring Entity until their receipt and final acceptance at the final destination.</p> <p>Intellectual Property Rights –</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	It may be included or stipulated in the Technical Specifications or Schedule of Requirements.
4	The inspections and tests that will be conducted are: <i>actual testing by the End-user or DOST testing, if applicable.</i>

Section VI. Schedule of Requirements

The delivery schedule expressed as weeks/months stipulates hereafter a delivery date which is the date of delivery to the project site.

Description	Quantity	Total	Delivered Period
<i>Services of a Research/Survey Company to Conduct 2023 PHLPost Customer Satisfaction Survey</i>	One (1) Lot	One (1) Lot	Eleven (11) months upon receipt of Notice to Proceed

Submitted by:

Name and signature of duly authorized representative

Name of Company: _____

Business Address: _____

Tel. No. / Fax No.: _____

Official Email address: _____

Other Contact No.: _____

Section VII. Technical Specifications

Notes for Preparing the Technical Specifications

A set of precise and clear specifications is a prerequisite for Bidders to respond realistically and competitively to the requirements of the Procuring Entity without qualifying their Bids. In the context of Competitive Bidding, the specifications (*e.g.* production/delivery schedule, manpower requirements, and after-sales service/parts, descriptions of the lots or items) must be prepared to permit the widest possible competition and, at the same time, present a clear statement of the required standards of workmanship, materials, and performance of the goods and services to be procured. Only if this is done will the objectives of transparency, equity, efficiency, fairness, and economy in procurement be realized, responsiveness of bids be ensured, and the subsequent task of bid evaluation and post-qualification facilitated. The specifications should require that all items, materials and accessories to be included or incorporated in the goods be new, unused, and of the most recent or current models, and that they include or incorporate all recent improvements in design and materials unless otherwise provided in the Contract.

Samples of specifications from previous similar procurements are useful in this respect. The use of metric units is encouraged. Depending on the complexity of the goods and the repetitiveness of the type of procurement, it may be advantageous to standardize the General Technical Specifications and incorporate them in a separate subsection. The General Technical Specifications should cover all classes of workmanship, materials, and equipment commonly involved in manufacturing similar goods. Deletions or addenda should then adapt the General Technical Specifications to the particular procurement.

Care must be taken in drafting specifications to ensure that they are not restrictive. In the specification of standards for equipment, materials, and workmanship, recognized Philippine and international standards should be used as much as possible. Where other particular standards are used, whether national standards or other standards, the specifications should state that equipment, materials, and workmanship that meet other authoritative standards, and which ensure at least a substantially equal quality than the standards mentioned, will also be acceptable. The following clause may be inserted in the Special Conditions of Contract or the Technical Specifications.

Sample Clause: Equivalency of Standards and Codes

Wherever reference is made in the Technical Specifications to specific standards and codes to be met by the goods and materials to be furnished or tested, the provisions of the latest edition or revision of the relevant standards and codes shall apply, unless otherwise expressly stated in the Contract. Where such standards and codes are national or relate to a particular country or region, other authoritative standards that ensure substantial equivalence to the standards and codes specified will be acceptable.

Reference to brand name and catalogue number should be avoided as far as possible; where unavoidable they should always be followed by the words “*or at least equivalent.*” References to brand names cannot be used when the funding source is the GOP.

Where appropriate, drawings, including site plans as required, may be furnished by the Procuring Entity with the Bidding Documents. Similarly, the Supplier may be requested to provide drawings or samples either with its Bid or for prior review by the Procuring Entity during contract execution.

Bidders are also required, as part of the technical specifications, to complete their statement of compliance demonstrating how the items comply with the specification.

Technical Specifications

Item	Specification	Statement of Compliance
		<p><i>[Bidders must state here either “Comply” or “Not Comply” against each of the individual parameters of each Specification stating the corresponding performance parameter of the equipment offered. Statements of “Comply” or “Not Comply” must be supported by evidence in a Bidders Bid and cross-referenced to that evidence. Evidence shall be in the form of manufacturer’s un-amended sales literature, unconditional statements of specification and compliance issued by the manufacturer, samples, independent test data etc., as appropriate. A statement that is not supported by evidence or is subsequently found to be contradicted by the evidence presented will render the Bid under evaluation liable for rejection. A statement either in the Bidder's statement of compliance or the supporting evidence that is found to be false either during Bid evaluation, post-qualification or the execution of the Contract may be regarded as fraudulent and render the Bidder or supplier liable for prosecution subject to the applicable laws and issuances.]</i></p>

Item	Technical Specifications	Statement of Compliance
1	<p style="text-align: center;">Terms of Reference</p> <p>I. BACKGROUND AND OBJECTIVE</p> <p>The Philippine Postal Corporation, hereafter referred to as the “Post Office”, is a Government-Owned and Controlled Corporation created pursuant to Republic Act No. 7354, otherwise known as the Postal Services Act of 1992. Two of the mandates of the Post Office is to plan, develop, promote, and operate a nationwide postal system with a network that extends or makes available, at least Ordinary Mail Service, to any settlements in the country as well as to provide for the collection, handling, transportation, delivery, forwarding, returning and holding of Mails, Parcels, and like materials throughout the Philippines and pursuant to agreements entered into, to and from foreign countries.</p> <p>The Post Office commits to provide continuous improvement of its services to its customers as well as compliance with its performance agreement with the Governance Commission for Government-Owned and Controlled Corporations (GCG), it has commissioned the services of a research/survey company beginning 2019 to conduct a transparent and objective Customer Satisfaction Survey (CSAT). For the GCG, the measurement and reporting of the level of the customer satisfaction provides a tangible and verifiable data on how effective the Post Office delivers its services.</p> <p>The winning research/survey company herein referred to as the “Service Provider” shall follow the Enhanced Standard Methodology for the Conduct of the Customer Satisfaction Survey issued by the GCG in implementing the CY2023 Customer Satisfaction Survey.</p> <p>II. TECHNICAL SPECIFICATIONS</p> <p>The Post Office will utilize a quantitative research methodology to conduct the Customer Satisfaction Survey. Quantitative research is considered stable from beginning to end and is subject to statistical assumptions and conditions as numerical values are assigned to responses. The Customer Satisfaction Survey will be in the form of a structured pen-and-paper questionnaire and shall be administered by trained field interviewers. The GCG has prescribed that the Post Office shall use the Intercept Interviews and Telephone Interviews. The intercept interviews with individual customers will be conducted in post office branches. For business/organization customers, the interviews are to be undertaken via telephone interviews.</p> <p>Since the Customer Satisfaction Survey is quantitative, the</p>	

selection of respondents will be done using probability sampling to ensure that the sample is representative of the customer population. The sampling procedure to be used for Individual Customers will be Multi-stage random sampling and the systematic sampling technique for corporate clients as prescribed by the GCG Guidelines. However, the Service Provider may still recommend other appropriate methodologies to utilize for the effective and efficient implementation of the survey, subject to the approval of the Post Office.

Furthermore, conduct of field research should follow and/or be compliant to pertinent provisions of Republic Act No. 10173, otherwise known as the Data Privacy Act, its applicable Implementing Rules and Regulations, and other pertinent Memorandum Circulars issued by the National Privacy Commission.

Below is the coverage of the Services to be engaged:

SERVICES	PRODUCTS
Mail Services	<ol style="list-style-type: none"> 1. Ordinary, Registered, Express Mails (Domestic, International) 2. Parcel (Domestic, International)
Financial Services	<ol style="list-style-type: none"> 1. Money Order/Remittance (Domestic, International) 2. Collection and Bills Payment 3. Postal ID
Logistics Services	<ol style="list-style-type: none"> 1. Transport/Delivery 2. Warehousing
Philatelic Services	<ol style="list-style-type: none"> 1. Commemorative/ Personalized/ Special Stamps 2. Other Philatelic Items/Merchandise

A. DATA COLLECTION

The data collection will be done by trained field interviewers along with their field supervisors using a structured pen and paper questionnaire.

Respondent Criteria

The respondents should satisfy at least one of the criteria below:

- (a) Current customer of the Post Office;
- (b) Has a current/active account with the Post Office; or,
- (c) Had at least one transaction with the Post Office during the time of visit.

SERVICES	PRODUCTS	QUALIFICATION OF RESPONDENTS
Mail Services	<ol style="list-style-type: none"> 1. Ordinary, Registered, Express Mail (Domestic, International) 2. Parcel (Domestic, International) 	<ul style="list-style-type: none"> • Should have sent/received at least once in the past six (6) months an Ordinary, Registered, Express Mail or Parcel, either international or domestic • Service Provider may propose additional qualification/s subject to the approval of the Post Office
Financial Services	<ol style="list-style-type: none"> 1. Money Order/ Remittance (Domestic, International) 2. Collection and Bills Payment 3. Postal ID 	<ul style="list-style-type: none"> • Should have sent/received at least once in the past six (6) months a Money Order/Remittance, either international or domestic • Regularly pays bills or monthly dues through our payment centers • Service Provider may propose additional qualification/s subject to the approval of the Post Office
Logistics Services	<ol style="list-style-type: none"> 1. Transport / Delivery 2. Warehousing 	<ul style="list-style-type: none"> • Should have availed logistics service at least once in the past six (6) months • Service Provider may propose additional qualification/s subject to the approval of the Post Office
Philatelic Services	<ol style="list-style-type: none"> 1. Commemorative/ Personalized/ Special Stamps 2. Other Philatelic Items/ Merchandise 	<ul style="list-style-type: none"> • Should have availed/bought philatelic stamps and/or other philatelic items/ merchandise at least once in the past six (6) months • Service Provider may propose additional qualification/s subject to the approval of the Post Office

The final criterion to be followed should be included in the screener portion of the questionnaire and should be clear among the interviewers.

Sample Universe

The sample universe refers to the names of the customers with their telephone numbers (for telephone interviews) and addresses (for face to face and door to door interviews). The sample universe should be provided to there searchers prior to the conduct of the systematic selection.

To ensure the confidentiality of the list, the researchers and all their partners shall sign a Non-Disclosure and Confidentiality Agreement which contains the following items:

- a. The list should only be used for the purposes of this particular customer satisfaction survey and should not be shared with anyone who is not involved in the Project.
- b. The master list should only be provided to the researcher who will be doing the systematic selection. All field interviewers should only be provided with the list of customers that they will be contacting.
- c. The list should be disposed of properly or returned to the Post Office. No copy of the list, be it printed or in soft copy format, should be left with the Service Provider.

In order to eliminate bias, the Post Office should not inform their customers that a customer satisfaction survey will be conducted. Instead, the Post Office should provide a letter to the Service Provider stating the purpose for which the Customer Satisfaction Survey is conducted and providing authority to the Service Provider to collect data on their behalf. The letter will be shown to the respondents before the conduct of interview proper.

At the minimum, the official letter must contain the following:

- a. Information about the Service Provider and what they will be conducting;
- b. Purpose of the research;
- c. Invitation of customers to participate in the survey; and,
- d. Assurance of confidentiality.

Sample Size

For the purpose of the Customer Satisfaction Survey, the sample size shall depend on the number of primary customer *per customer type*.

The required sample sizes per customer type are as follows:

- a. 500 for nationwide coverage → MOE of +/-4.3% at 95% confidence level
- b. 300 for area-specific coverage → MOE of +/-5.6% at 95% confidence level
- c. 100 for customer type with small universe or when the number of the total primary customers is not enough to reach at least a sample size of n=300 for the survey → MOE of +/-9.8% at 95% confidence level
- d. Total universe should be targeted as survey respondents for customer types with total primary customers of less than 100
- e. At least n=100 should be targeted for each sub-segment (e.g. region, age, gender, etc.) for data to be analyzed, if needed → MOE of +/-9.8% at 95% confidence level

The selection of the respondents in each type of service is by random sampling method. The Service Provider shall propose random sample generator to be used. The following are the minimum sample size as well as distribution of respondents:

	SAMPLE SIZE
a. Individual Customers	1,200 samples Across 9 Postal Areas
b. Corporate Customers	120 samples Across 9 Postal Areas

The Customer Satisfaction Survey has to be conducted annually. However, since the Post Office observes peak and lean seasons, the survey should be conducted twice a year or one (1) for each season.

Area of Coverage

POSTAL AREAS	INDIVIDUAL CUSTOMERS		CORPORATE CUSTOMERS	
	Sample Size	No. of Cities/ Municipalities and/ or Post Offices	Govern ment	Private
1. Northeast Luzon Area	100	10	8	2
2. Northwest Luzon Area	100	10	8	2

3. Mega Manila Area	300	30	24	7
4. Southern Luzon Area	150	15	12	3
5. Central & Eastern Visayas Area	150	15	12	3
6. Western Visayas Area	100	10	8	2
7. Eastern Mindanao Area	150	15	12	3
8. Central Mindanao Area	100	10	8	2
9. Western Mindanao Area	50	5	4	1
Total	1,200	120	96	24
			120	

B. DATA COLLECTION INSTRUMENT

The quantitative study will make use of a structured questionnaire, which will ensure consistency all throughout the project and eliminate interviewer bias. This questionnaire ensures:

- a. More rigid style of interviewing;
- b. Presence of close-ended and open-ended questions;
- c. Highly structured way of questioning; and
- d. Assigned of numerical values to responses.

The length of the interview will be 15 minutes at the maximum, particularly for telephone interviews and intercept interviews, as lengthy interviews often result in higher refusal and drop-out rates.

The actual length of interview will be determined during the pre-test of the questionnaire. Should the questionnaire be longer than 15 minutes, the information coverage will be reviewed and checked for prioritization of questions.

The questionnaire is composed of three (3) sections:

- a. Screener
- b. Main Questionnaire
 - Transacting with the Post Office
 - Overall Satisfaction
 - Execution of Service
- c. Socio-Demographic Profile

Questions under the Main Questionnaire are fixed and may not be altered, modified, or deleted.

A 5-point Likert scale shall be used for the overall satisfaction rating question that determines the level of

satisfaction/dissatisfaction of the customers.

Very Satisfied	Satisfied	Neither Satisfied nor Dissatisfied	Dissatisfied	Very Dissatisfied
5	4	3	2	1

Explanation of the scale should be read out to the respondents while showing them the show card of the scale. Interviewers should explain the scale repeatedly through the conduct of the survey until the respondent gets used to it. Below are the explanations of each point in the scale:

Very satisfied	Performance of the Post Office meets and exceeds the needs and expectations, to the benefit, of the customer. The service was provided with few minor problems or none at all. If there were few minor problems, a corrective action might have already taken place which is deemed highly effective.
Satisfied	Performance of the Post Office meets the minimum expectations of the customer. The service was provided with few minor problems or none at all. If there were few minor problems, a correction action might have already taken place which is deemed highly effective.
Neither Satisfied nor Dissatisfied	This is the midpoint in which the respondents cannot truly pick a side in the spectrum. However, this does not mean that the respondent has no opinion or does not know. Performance of the Post Office neither meets nor doesn't meet the minimum expectations of the customer.
Dissatisfied	Performance of the Post Office does not meet the minimum expectations of the customers. There are a number of elements or aspects in the Post Office's customer service that reflects a problem for which the Post Office has not yet identified corrective actions. If there were corrective actions, then the action is perceived by the customer as ineffective or has not been fully implemented to be effective.

	<p>Very Dissatisfied</p>	<p>Performance of the Post Office does not meet most or did not meet any of the expectations of the customers. There area number of elements or aspects in the Post Office's customer service that reflects a serious problem for which the Post Office has not yet identified corrective actions. If there were corrective actions, then the action is perceived by the customer as very ineffective or has totally been disregarded.</p>	
<p>C. QUALITY CONTROL</p> <p>To be able to ensure that the data gathered from the Customer Satisfaction Survey is of highest quality possible, quality control procedures should be set in place. A pre-test should be conducted to test the instrument in an actual respondent/scenario prior to actual fieldwork to ensure clarity and comprehension, to check for bias, assess interview length, and anticipate possible issues on field and agree on resolutions prior to training period. There is a required pre-test to at least three (3) to five (5) respondents for each customer type, depending on the size of the population/customer base.</p> <p><i>a. Spot Checking</i> Spot checking involves going to the data collection area to check among others if: (1) interviewers did proper sampling; (2) proper skipping was implemented; (3) interviewers are indeed in the area covered by the study; (4) or interviewers are interviewing correctly.</p> <p><i>b. Back-checking</i> Back-checking is the subsequent re-contacting or revisiting respondents to check whether the interviews were conducted and completed and whether the responses recorded by the interviewer were consistent and accurate. As a standard, at least 30% of the total sample size should be back-checked. A combination of phone and in person back checking should be done.</p> <p>The field manager will ensure the proper field implementation of the study content and distribution and scheduling of visit.</p> <p>As part of the ESOMAR codes and guidelines, the identity of the respondents will be kept confidential from the GCG or the Post Office. If there is any requirement from the GCG or the Post Office to reveal the identity of the respondents, limited only to their addresses/locations, the consent of the respondents will</p>			

be sought first. However, if the respondents want to keep their locations/addresses confidential and detached from the survey results, this will be adhered to by the researcher.

D. ANALYSIS PLAN

The analysis plan will serve as the basis for the preparation of the Final Report. The results shall be analyzed looking into the following segments, as may be applicable:

- Total
- By Customer Type
 - General Public/Individual Customers
 - Businesses/Organizations /Public Institutions
- By Area (depending on the sample area coverage)
 - Total for Luzon
 - Total for Visayas
 - Total for Mindanao
- By Region or Key City
- By Type of Service Availed
- By Rating
- Drivers of Satisfaction (derived importance)

Depending on customer type, the following demographic segmentation may also be looked into:

- General Public/Individual Customers
 - Gender
 - Age/Age Group
 - Working Status
 - Educational Attainment
 - Civil Status
- Businesses/Organizations
 - Type of Business
 - Industry
 - Products
 - Business Size
 - Number of Employees
 - Revenue
 - Year of Establishment
 - Position in the Organization (respondent)
 - Years in the Organization (respondent)
 - Decision-Making Role in the Organization (respondent)

The above segments should only be read if sample size allows or if sub-segments are $n > 100$. If the total sample size is $n < 100$, it can only be read at a total level.

III. STATUS REPORTS AND DOCUMENTS FOR SUBMISSION

The following documents are required to be submitted to the Post Office as part of the Quarterly/Annual Monitoring

Report of our Performance Scorecard with the Governance Commission for GOCCs (GCG):

ACTIVITY	DOCUMENT FOR SUBMISSION	DUE DATE
Pre-test	Survey Instrument Stimulus Material Pre-Test Results Pre-Test Report	Quarterly Monitoring Report
Training	Survey Instrument Stimulus Material Training Manual Training Report	Quarterly Monitoring Report
Project Kick-Off/ Start Off	Survey Instrument Stimulus Material Observation Report Clearing/Debriefing Report	Quarterly Monitoring Report
Project Implementation	Supervision/Observation Report Fieldwork Progress Report	Quarterly Monitoring Report
Back-checking and Spot checking	Back-checking and Spot checking Report	Quarterly Monitoring Report
Data Processing	Spot Checking Report Data Processing Data Quality Control Report	Annual Accomplishment Report
Analysis	Final Report	Annual Accomplishment Report

Moreover, the following analyses are the minimum required information to be presented in the Final Report:

- a. Data Gathering Methodology (i.e. sampling procedure, total primary customers, sample size used, survey methodology, frequency of data collection)
- b. Percentage of Satisfied Customers using Top 2 Box (Very Satisfied and Satisfied)
- c. Averaging of the Overall Satisfaction Rating
- d. Comparison of Current Year Ratings versus Previous Year Ratings
- e. Crosstabs of the Reasons for the Overall Satisfaction Rating against Type of Raters (Positive and Negative) to Determine Top Reasons for Satisfaction and Top Reasons for Dissatisfaction
- f. Deriving Importance
 1. Correlation

- 2. Kruskal Analysis
- g. Plotting in a Scatter Diagram

IV. QUALIFICATIONS OF THE RESEARCH/SURVEY COMPANY

In view of the objectives and expected outcomes of the Customer Satisfaction Survey to be procured as well as pursuant to Section 24.3 of the 2016 Revised Implementing Rules and Regulations of Republic Act No. 9184, otherwise known as the Government Procurement Reform Act, hereto after referred as 2016 IRR of RA No. 9184, the following persons and/or entities may participate in the procurement of the aforementioned service:

1. At least ten (10) years of experience in the provision of research/survey services such as:
 - Market Research and Strategy Consulting Services;
 - Customer Preference survey; and,
 - Customer Satisfaction survey.

2. Any one of the following recognized and/or accredited and/or Service Provider under Philippine Law;
 - Duly licensed Filipino citizens and/or sole proprietorships;
 - Partnerships 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;
 - 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;
 - Cooperatives duly organized under the laws of the Philippines; or,
 - Persons/entities forming themselves into a joint venture, i.e. a group of two (2) or more persons and/or 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 joint venture agreement.

3. Refutable and competent to provide the survey nationwide with its own manpower to conduct the fieldwork and data processing.
 - Manpower and/or personnel consists of qualified Market Research professionals to undertake the research/survey services;

4. Conformity with the required research/survey team

composition and structure as stated in the aforementioned GCG guidelines, such as:

- Overall Project Manager
- Statistician/Assistant Project Manager
- Field Manager
- Data Processing Manager
- Field Supervisors
- Data Processing Supervisors
- Programmers/Scripters (including checker)
- Data Processing Assistants (including checker)
- Group Leaders
- Field Interviewers
- Coders
- Field Quality Checkers/Back-Checkers

5. Member of a research, consulting and/or industry-related organization/s related to the research/survey services, such as but not limited to the following:

- Institute of Management Service Providers of the Philippines;
- Marketing and Opinion Research Society of the Philippines; or,
- Supply Chain Management Association of the Philippines.

6. Completed and/or undertaken within the last three (3) years at least one (1) contract similar to the research/survey services in which the Approved Budget for the Contract (ABC), was at least fifty percent (50%) of the ABC of this research/survey services.

V. SHORTLISTING CRITERIA AND RATING SYSTEM

Based on section 24 of R.A. 9184, the criteria and rating system for short listing of research/survey agencies is as follows:

CRITERIA	% WEIGHT
Applicable experience of the Service Provider and members on case of joint ventures, considering both the overall experiences of the firm or, in the case of new firms, the individual experiences of the principal and key staff, including the times when employed by other Service Providers;	40
Qualification of personnel who may be assigned to the job vis-à-vis extent and complexity of the undertaking; and	35
Current workload relative to capacity	20

Member of MORES (Marketing and Opinion Research Society of the Phil.) or PSSC (Philippine Social Science Council) or other organizations providing similar services	5
TOTAL	100

VI. APPROVED BUDGET FOR THE CONTRACT

For the conduct of two (2) waves of Customer Satisfaction Survey, with two (2) modes of interview each, the ABC of the survey services is Six Million Pesos and 0/100 Centavos (PhP 6,000,000.00). The source of the ABC is the corporate funds of the Post Office.

SERVICES	PARTICULARS	DELIVERABLES (In Paper Copies and Digital Files)	AMOUNT (In Philippine Peso)
Customer Satisfaction Survey	Customer Satisfaction Survey – 1 st and 2 nd Bi-Annual 1. Customer Satisfaction Survey Methodology and Tools 2. Customer Satisfaction Raw Data 3. Customer Satisfaction Survey Report	6 documents in total –3 for Wave 1, and 3 for Wave 2 17 original copies 15 reproduction copies 1 External Hard Drive containing all digital files of required documents	6,000,000.00
TOTAL		6 documents	P6,000,000.00

Original copies will be provided to the following Offices:

1. Office of the Board of Directors
2. Office of the Postmaster General and CEO
3. Office of the APMG for Operations
4. Office of the APMG for Administration and Finance
5. Office of the APMG for Management Support Services
6. Business Lines Department
7. Corporate Planning Department
8. Service Regulations Department
9. Offices of the Area Director (9 Postal Areas)

Reproduction copies will be provided to the Support Service Managers of the nine (9) Postal Areas and six (6) Members of the Post Office Board of Directors

VII. TIMELINE OF ACTIVITIES (Please see Page 46)

VIII. PAYMENT SCHEDULE

SCHEDULE	ACTIVITIES	PAYMENT
Initial Payment	Upon submission and approval of the inception report (with indicated sampling design, methodology, protocols, work plans and specific timelines)	5%
Second Payment	Upon submission and acceptance of the pilot-testing results and finalized survey questionnaire	20%
Third Payment	Conduct of the Data Collection and Tabulation of Raw Data for Customer Satisfaction Survey 1st Bi-Annual	20%
Fourth Payment	Submission of Draft Report and Presentation of the Result of the Customer Satisfaction Survey for 1st Bi-Annual	5%
Fifth Payment	Submission of Final Report of the Customer Satisfaction Survey for 1st Bi-Annual	10%
Sixth Payment	Conduct of Data Collection and Tabulation of Raw Data for Customer Satisfaction Survey 2nd Bi-Annual	20%
Seventh Payment	Submission of Draft Report and Presentation of the Result of the Customer Satisfaction Survey for 2nd Bi-Annual	5%
Final Payment	Submission of Final Report of the Customer Satisfaction Survey for 2nd Bi-Annual	15%
TOTAL		100%

IX. NON-DISCLOSURE AGREEMENT

The Service Provider and all its partners shall sign a Non-Disclosure and Confidentiality Agreement which contains the following:

- a. The list should only be used for the purposes of this particular customer satisfaction survey and should not be shared with anyone who is not involved in the project.
- b. The master list should only be provided to the researcher who will be doing the systematic selection. All field interviewers should only be provided with the list of customers they will be interviewing.

	<p>c. The list should be disposed of properly or returned to the Post Office. No copies of the list, be printed or in soft copy formats, should be left with the Service Provider.</p> <p>Except with prior written consent of the Post Office, the Service Provider shall not at anytime communicate to any person or entity any confidential information acquired in the course of the research/survey engagement, nor shall the Service Provider make profit from or make public the findings/observations/recommendations formulated in the course of and/or as a result of the research/survey service.</p> <p>The Service Provider shall value the importance of impartiality in the research/survey engagement process and shall use all reasonable efforts to manage possible conflicts of interest and ensure the objectivity of the research/survey result.</p> <p>The Post Office shall undertake legal actions against the Service Provider should any or all parts of the research/survey is made public and/or disclosed to parties other than the Post Office.</p>	
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Submitted by:

Name and signature of duly authorized representative
 Name of Company: _____
 Business Address: _____
 Tel. No. / Fax No.: _____
 Official Email address: _____
 Other Contact No.: _____

TIMELINE OF ACTIVITIES

ACTIVITIES	Apr 2023				May 2023				Jun 2023				Jul 2023				Aug 2023				Sep 2023				Oct 2023				Nov 2023				Dec 2023				Jan 2024				Feb 2024				Statement of Compliance
	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4					
1. CSAT – Wave 1																																													
a. Set-up	█	█	█	█																																									
b. Fieldwork					█	█	█	█																																					
c. Data processing									█	█	█	█																																	
d. Analysis and reporting													█	█	█	█																													
<i>(20 Weeks Intervention Period in between each data gathering activity)</i>																																													
2. CSAT – Wave 2																																													
a. Set-up																					█	█	█	█																					
b. Fieldwork																									█	█	█	█	█	█	█	█													
c. Data processing																																					█	█	█	█					
d. Analysis and reporting																																									█	█	█	█	

Section VIII. Checklist of Technical and Financial Documents

Notes on the Checklist of Technical and Financial Documents

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

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

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

Checklist of Technical and Financial Documents

I. TECHNICAL COMPONENT ENVELOPE

Class “A” Documents

Legal Documents

- (a) Valid PhilGEPS Registration Certificate (Platinum Membership) (all pages);
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.

II. FINANCIAL COMPONENT ENVELOPE

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

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

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

NOTE: *Please download and use the latest BIDDING FORMS as prescribed under GPPB RESOLUTION NO. 16-2020*

