



**PHILIPPINE NATIONAL OIL COMPANY
PNOC BLDG. 6, ENERGY CENTER, RIZAL DRIVE,
BONIFACIO GLOBAL CITY, TAGUIG CITY**

PHILIPPINE BIDDING DOCUMENTS

**Project Title : Rebidding for the Engagement of
Consultancy Services for the Retail
Electricity Supplier (RES) Business of
PNOC**

REI No. : 2025-03-079

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**Rebidding for the
Engagement of Consultancy
Services for the Retail
Electricity Supplier (RES)
Business of PNOC**

REI No.: 2025-03-079

PART I

Checklist of Eligibility Requirements

1. Eligibility documents Submission Form (Annex A)

Class “A” Documents

Legal Documents

2. Valid PhilGEPS Registration Certificate (Platinum Membership) (all pages) in accordance with Section 8.5.2 of the IRR;

Technical Documents

3. Statement of Consultant’s Nationality (Annex B)
4. Curriculum Vitae for the Proposed Professional Staff (Annex C)
5. Statement of Completed Contracts (Annex D)
6. Certificate of Good Standing, Acceptance Report, Certificate of Satisfactory Service Rendered, or Any Proof of Satisfactory Completion of Completed Contracts
7. Statement of Ongoing and Awarded but Not Yet Started Contracts (Annex E)

Class “B” Document

8. Valid Joint Venture Agreement (JVA) if JV is 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.

Section I. Request for Expression of Interest



PHILIPPINE NATIONAL OIL COMPANY

PNOC Building VI, Energy Center

Rizal Drive, BGC, Taguig City

Tel. No.: 789 – 7662

www.pnoc.com.ph

www.philgeps.gov.ph

REQUEST FOR EXPRESSION OF INTEREST

Rebidding for the Engagement of Consultancy Services for the Retail Electricity Supplier (RES) Business of PNOC

Request for Expression of Interest No. 2025-03-079

1. The *PHILIPPINE NATIONAL OIL COMPANY. (PNOC)*, through the *2025 Approved Corporate Operating Budget* intends to apply the sum of One Million Eight Hundred Thousand Pesos (PhP1,800,000.00) being the Approved Budget for the Contract (ABC) to payments under the contract for *Rebidding for the Engagement of Consultancy Services for the Retail Electricity Supplier (RES) Business of PNOC*. Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
2. The *PNOC* now calls for the submission of eligibility documents for the *Rebidding for the Engagement of Consultancy Services for the Retail Electricity Supplier (RES) Business of PNOC*. Eligibility documents of interested consultants must be duly received by the BAC Secretariat on or before *April 03, 2025 (10:00AM)* at *PNOC Bldg. 6, Energy Center, Rizal Drive, Bonifacio Global City, Taguig City*. Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion.
3. Interested bidders may obtain further information from the *PNOC Procurement Management Division* and inspect the Bidding Documents at the address given below during *working days from 8:00 AM to 5:00 PM*.
4. The Bidding Documents (Part 1) may be acquired on *March 27, 2025* by interested Consultants from the address below. Short Listed Consultants may only be allowed to acquire the Bidding Documents (Part 2) and drop their Technical and Financial Proposals upon payment of the applicable bidding documents fee, pursuant to the latest Guidelines issued by the GPPB, in the amount of *One Thousand Eight Hundred Pesos (PhP1,800.00)*.

Bidding Documents may also be downloaded free of charge from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the website of the Procuring Entity, provided that Bidders shall pay the applicable fee for the Bidding Documents not later than the submission of their bids.

5. Opening of Eligibility Documents shall be **immediately after the deadline of submission** at the given address below and/or via *Google Meet*. Eligibility Documents shall be opened in the presence of the bidders’ representatives who choose to attend the activity. Late submissions shall not be accepted

6. The BAC shall draw up the short list of consultants from those who have submitted Expression of Interest, including the eligibility documents, and have been determined as eligible in accordance with the provisions of Republic Act 9184 (RA 9184), otherwise known as the "Government Procurement Reform Act", and its Implementing Rules and Regulations (IRR). The short list shall consist of three (3) bidders who will obtain at least fifty-five (55) points out of one hundred (100) and will be eligible to submit bids. The criteria and rating system for short listing are:

- a. *Applicable Years of Experience and Track Record of the Consultancy Firm* : 30 points
- b. *Qualification of Personnel to be assigned to the Project* : 50 points
- c. *Current Workload Relative to Capacity* : 20 points

7. Bidding will be conducted through open competitive bidding procedures using non-discretionary "pass/fail" criterion as specified in the IRR of RA 9184.

Bidding is restricted to Filipino citizens/sole proprietorships, cooperatives, and partnerships or organizations with at least sixty percent (60%) interest or outstanding capital stock belonging to citizens of the Philippines.

8. The Procuring Entity shall evaluate bids using the **Quality - Cost Based Evaluation/Selection (QCBE/QCBS)** procedure. The weights to be allocated for the Technical Proposal is **Eighty Percent (80%)** and Financial Proposal is **Twenty Percent (20%)**. The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders.

9. The contract shall be completed within a period of Two Hundred Seventy (270) calendar days from the receipt of the Notice to Proceed.

10. The **PNOC** reserves the right to reject any and all bids, declare a failure of bidding, or not award the contract at any time prior to contract award in accordance with Section 41 of RA 9184 and its IRR, without thereby incurring any liability to the affected bidder or bidders.

11. For further information, please refer to:

The Secretariat
Bids and Awards Committee
Philippine National Oil Company
G/F PNOC Bldg. 6, Energy Center, Rizal Drive,
Bonifacio Global City, Taguig City
Tel. Nos.: 8789 – 7662 local 7757
Email: cfc_melo@pnoc.com.ph / procurement@pnoc.com.ph
Website: www.pnoc.com.ph / www.philgeps.gov.ph

ATTY. JOSEPHINE CASSANDRA J. CUI
BAC Chairperson

Section II. Eligibility Documents

Notes on the Eligibility Documents

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

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

1. Eligibility Criteria

- 1.1. The following persons/entities shall be allowed to participate in the bidding for Consulting Services:
 - (a) Duly licensed Filipino citizens/sole proprietorships;
 - (b) Partnerships duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the interest belongs to citizens of the Philippines;
 - (c) Corporations duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the outstanding capital stock belongs to citizens of the Philippines;
 - (d) Cooperatives duly organized under the laws of the Philippines; or
 - (e) Persons/entities forming themselves into a joint venture, *i.e.*, a group of two (2) or more persons/entities that intend to be jointly and severally responsible or liable for a particular contract: Provided, however, That Filipino ownership or interest thereof shall be at least sixty percent (60%). For this purpose, Filipino ownership or interest shall be based on the contributions of each of the members of the joint venture as specified in their JVA.
- 1.2. When the types and fields of Consulting Services involve the practice of professions regulated by law, those who will actually perform the services shall be Filipino citizens and registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions specified in the **EDS**.
- 1.3. If the Request for Expression of Interest allows participation of foreign consultants, prospective foreign bidders may be eligible subject to the conditions stated in the **EDS**.
- 1.4. Government owned or –controlled corporations (GOCCs) may be eligible to participate only if they can establish that they (a) are legally and financially autonomous, (b) operate under commercial law, and (c) are not attached agencies of the Procuring Entity.

2. Eligibility Requirements

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

Legal Documents

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

Technical Documents

- (ii) Statement of the prospective bidder of all its ongoing and completed government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid, within the relevant period provided in the **EDS**. The statement shall include, for each contract, the following:
 - (ii.1) the name and location of the contract;
 - (ii.2) date of award of the contract;
 - (ii.3) type and brief description of consulting services;
 - (ii.4) consultant's role (whether main consultant, subconsultant, or partner in a JV)
 - (ii.5) amount of contract;
 - (ii.6) contract duration; and
 - (ii.7) certificate of satisfactory completion or equivalent document specified in the **EDS** issued by the client, in the case of a completed contract;
- (iii) Statement of the consultant specifying its nationality and confirming that those who will actually perform the service are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions in accordance with Clause 1.2, including their respective curriculum vitae.

- (b) Class "B" Document –

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

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

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

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

3. Format and Signing of Eligibility Documents

- 3.1. Prospective bidders shall submit their eligibility documents through their duly authorized representative on or before the deadline specified in Clause 5.
- 3.2. Prospective bidders shall prepare an original and copies of the eligibility documents. In the event of any discrepancy between the original and the copies, the original shall prevail.
- 3.3. The Eligibility Documents Submission Form shall be signed by the duly authorized representative/s of the Bidder. Failure to do so shall be a ground for the rejection of the eligibility documents.
- 3.4. Any interlineations, erasures, or overwriting shall be valid only if they are signed or initialed by the duly authorized representative/s of the prospective bidder.

4. Sealing and Marking of Eligibility Documents

- 4.1. Prospective bidders shall enclose their original eligibility documents described in Clause 2.1, in a sealed envelope marked "ORIGINAL – ELIGIBILITY DOCUMENTS". Each copy thereof shall be similarly sealed duly marking the envelopes as "COPY NO. ___ - ELIGIBILITY DOCUMENTS". These envelopes containing the original and the copies shall then be enclosed in one single envelope.
- 4.2. The original and the number of copies of the eligibility documents as indicated in the **EDS** shall be typed or written in ink and shall be signed by the prospective bidder or its duly authorized representative/s.
- 4.3. All envelopes shall:
 - (a) contain the name of the contract to be bid in capital letters;
 - (b) bear the name and address of the prospective bidder in capital letters;

- (c) be addressed to the Procuring Entity’s BAC specified in the **EDS**;
 - (d) bear the specific identification of this Project indicated in the **EDS**; and
 - (e) bear a warning “DO NOT OPEN BEFORE...” the date and time for the opening of eligibility documents, in accordance with Clause 5.
- 4.4 Eligibility documents that are not properly sealed and marked, as required in the bidding documents, shall not be rejected, but the bidder or its duly authorized representative shall acknowledge such condition of the documents as submitted. The BAC shall assume no responsibility for the misplacement of the contents of the improperly sealed or marked eligibility documents, or for its premature opening.

5. Deadline for Submission of Eligibility Documents

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

6. Late Submission of Eligibility Documents

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

7. Modification and Withdrawal of Eligibility Documents

- 7.1. The prospective bidder may modify its eligibility documents after it has been submitted; provided that the modification is received by the Procuring Entity prior to the deadline specified in Clause 5. The prospective bidder shall not be allowed to retrieve its original eligibility documents, but shall be allowed to submit another set equally sealed, properly identified, linked to its original bid marked as “ELIGIBILITY MODIFICATION” and stamped “received” by the BAC. Modifications received after the applicable deadline shall not be considered and shall be returned to the prospective bidder unopened.
- 7.2. A prospective bidder may, through a letter of withdrawal, withdraw its eligibility documents after it has been submitted, for valid and justifiable reason; provided that the letter of withdrawal is received by the Procuring Entity prior to the deadline prescribed for submission and receipt of eligibility documents.
- 7.3. Eligibility documents requested to be withdrawn in accordance with this Clause shall be returned unopened to the prospective bidder concerned. A prospective bidder that withdraws its eligibility documents shall not be permitted to submit another set, directly or indirectly, for the same project. A prospective bidder that acquired the eligibility documents may also express its intention not to participate in the bidding through a letter which should reach

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

8. Opening and Preliminary Examination of Eligibility Documents

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

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

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

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

- (a) the name of the prospective bidder;
- (b) whether there is a modification or substitution; and
- (c) the presence or absence of each document comprising the eligibility documents vis-à-vis a checklist of the required documents.

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

9. Short Listing of Consultants

- 9.1. Only prospective bidders whose submitted contracts are similar in nature and complexity to the contract to be bid as provided in the **EDS** shall be considered for short listing.
- 9.2. The BAC shall draw up the short list of prospective bidders from those declared eligible using the detailed set of criteria and rating system to be used specified in the **EDS**.
- 9.3. Short listed consultants shall be invited to participate in the bidding for this project through a Notice of Eligibility and Short Listing issued by the BAC.

10. Protest Mechanism

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

Section III. Eligibility Data Sheet

Eligibility Data Sheet

Eligibility Documents	
1.2	<p>Consultant shall undertake the following:</p> <p>The principal tasks, duties and responsibilities of the Consultant are outlined below.</p> <p style="padding-left: 40px;">1. Prepares the Comprehensive Implementation Plan for the Operation of PNOC’s RES Business</p> <p>This must address all critical aspects of establishing PNOC as a Retail Electricity Supplier (RES), including:</p> <p style="padding-left: 40px;">1.1 Market Analysis</p> <p style="padding-left: 80px;">1.1.1 Demand Analysis:</p> <p style="padding-left: 120px;">a. Assessment of current market trends, including the adoption of renewable energy, retail competition, and open access.</p> <p style="padding-left: 120px;">b. Profiling of the target market, with an emphasis on contestable Government Agencies.</p> <p style="padding-left: 120px;">c. Demand growth projections based on historical trends and future developments.</p> <p style="padding-left: 80px;">1.1.2 Competitive Landscape:</p> <p style="padding-left: 120px;">a. Analysis of existing RES providers, pricing strategies, and market share.</p> <p style="padding-left: 120px;">b. SWOT analysis to evaluate PNOC’s strengths, weaknesses, opportunities, and threats.</p> <p style="padding-left: 80px;">1.1.3 Customer Insights:</p> <p style="padding-left: 120px;">a. Identification of customer needs, preferences, and decision-making criteria.</p> <p style="padding-left: 120px;">b. Analysis of customer pain points and potential solutions offered by PNOC.</p> <p style="padding-left: 40px;">1.2 Regulatory Compliance</p> <p style="padding-left: 80px;">1.2.1 Detailed outline of the requirements for obtaining an RES license from the Energy Regulatory Commission (ERC).</p> <p style="padding-left: 80px;">1.2.2 Identification of compliance gaps and recommendations for addressing them.</p> <p style="padding-left: 80px;">1.2.3 Timeline and cost analysis for meeting regulatory requirements.</p> <p style="padding-left: 40px;">1.3 Business Model Development</p> <p style="padding-left: 80px;">1.3.1 Pricing Mechanism</p> <p style="padding-left: 120px;">a. Cost recovery and competitive pricing strategies</p> <p style="padding-left: 120px;">b. Compliance with ERC-approved rates</p> <p style="padding-left: 80px;">1.3.2 Revenue Streams</p> <p style="padding-left: 120px;">a. Power supply contracts</p>

	<ul style="list-style-type: none"> b. Ancillary services (e.g., energy audits, training programs) <p>1.3.3 Risk Management</p> <ul style="list-style-type: none"> a. Identification of potential risks (e.g., policy changes, non-payment) b. Mitigation strategies (e.g., insurance, flexible contracts) <p>1.4 Operational Framework</p> <p>1.4.1 Organizational Structure</p> <ul style="list-style-type: none"> a. Roles and responsibilities of PNOC’s RES team b. Coordination with other PNOC departments (e.g., legal, finance) <p>1.4.2 Processes and Workflows</p> <ul style="list-style-type: none"> a. Customer onboarding and service provision b. Billing and payment systems c. Data management and reporting <p>1.4.3 Integration with Energy Systems</p> <ul style="list-style-type: none"> a. Coordination with WESM and grid operators b. Integration of renewable energy sources <p>1.5 Technology and Infrastructure Plan</p> <p>1.5.1 IT and Energy Management Systems</p> <ul style="list-style-type: none"> a. Development of robust customer management platforms b. Tools for monitoring and optimizing energy supply <p>1.5.2 Renewable Energy Integration</p> <ul style="list-style-type: none"> a. Facilitation of solar, wind, or hydroelectric power sources b. Smart metering and real-time tracking of consumption <p>1.6 Training and Capacity Building Plan</p> <p>1.6.1 Staff Training Programs</p> <ul style="list-style-type: none"> a. Technical knowledge in energy supply and demand management b. Updates on energy laws and market trends <p>1.6.2 Client Education</p> <ul style="list-style-type: none"> a. Workshops and seminars for government agencies on energy savings b. Dissemination of best practices in energy consumption <p>1.7 Monitoring and Evaluation Plan</p> <p>1.7.1 Key Performance Indicators (KPIs)</p> <ul style="list-style-type: none"> a. Customer satisfaction ratings b. Achievement of renewable energy targets c. Financial performance metrics <p>1.7.2 Feedback Mechanisms</p> <ul style="list-style-type: none"> a. Regular surveys and consultation with government clients b. Mechanisms for addressing complaints and suggestions
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	<p>1.7.3 Continuous Improvement</p> <ul style="list-style-type: none"> a. Regular audits of processes and systems b. Adoption of new technologies and practices <p>1.8 Implementation Timeline</p> <p>1.8.1 Short-term Goals (0-12 months)</p> <ul style="list-style-type: none"> a. Licensing and accreditation b. Initial government client acquisition <p>1.8.2 Medium-term Goals (1-3 years)</p> <ul style="list-style-type: none"> a. Expansion of client base b. Establishment of robust IT systems <p>1.8.3 Long-term Goals (3-5 years)</p> <ul style="list-style-type: none"> a. Market leadership in the government sector b. Integration of advanced technologies and renewable energy sources <p>1.9 Budget and Financial Projections</p> <p>1.9.1 Cost Estimates</p> <ul style="list-style-type: none"> a. Licensing and operational setup b. Marketing and outreach expenses <p>1.9.2 Revenue Projections</p> <ul style="list-style-type: none"> a. Anticipated revenue from government contracts b. Break-even analysis <p>1.10 Conclusion</p> <p>1.10.1 Summary of PNOC’s vision for its RES business</p> <p>1.10.2 Commitment to sustainability, compliance, and service excellence.</p> <p>2. Advisory and expert support activities to the PNOC RES team:</p> <p>2.1 Provide guidance and expert consultations to the PNOC RES team as needed, ensuring they receive the necessary support to address challenges, make informed decisions, and achieve their objectives effectively.</p> <p>2.2 Accompany the PNOC RES team and assist them in responding to inquiries from suppliers and clients during coordination and clarification meetings.</p> <p>2.3 Facilitate capacity-building activities for the PNOC RES team during the engagement period (i.e., the Consultant to identify the necessary capacity-building activities based on the PNOC RES team's needs).</p>
1.3	No further instructions.
2.1(a)(ii)	The statement of all ongoing and completed government and private contracts shall include all such contracts within <i>five (5) years</i> prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	<i>Acceptable proof of satisfactory completion of completed contracts, either of the following:</i>

	<p><i>a. Certificate of Completion / Acceptance</i></p> <p><i>b. Official Receipt</i></p>
4.2	Each prospective bidder shall submit one (1) original and two (2) copies of its eligibility documents.
(c)	<p><i>Bids and Awards Committee of the Procuring Entity concerned with the Project.</i></p> <p style="text-align: center;">ATTY. JOSEPHINE CASSANDRA J. CUI Chairperson Bids and Awards Committee Philippine National Oil Company G/F PNOC Bldg. 6, Energy Center, Rizal Drive, Bonifacio Global City, Taguig City</p>
4.3 (d)	<p><i>Rebidding for the Engagement of Consultancy Services for the Retail Electricity Supplier (RES) Business of PNOC</i></p> <p>Request for Expression of Interest No. 2025-03-079</p>
5	<p>The address for submission of eligibility documents is <i>PNOC Bldg. 6, Energy Center, Rizal Drive, Bonifacio Global City, Taguig City</i></p> <p>The deadline for submission of eligibility documents is <i>on April 03, 2025 (10:00 AM PST)</i></p>
8.1	<p>The place of opening of eligibility documents is <i>PNOC Bldg. 6, Energy Center, Rizal Drive, Bonifacio Global City, Taguig City</i></p> <p>The date and time of opening of eligibility documents is <i>immediately after the deadline of submission.</i></p>
9.1	Similar contracts/projects shall refer to Provision of Services Related to Energy Solutions or Retail Electricity Supply Business

9.2

Detailed set of criteria and rating system to be used for the short listing of consultants.

Criteria for Short Listing of Prospective Bidders

A maximum of three qualifying bids with at least 50 points out of 100 shall be shortlisted in the shortlisting round. The term “Similar Projects/Contracts” shall be defined as “Provision of Services Related to Energy Solutions or Retail Electricity Supply Business”.

The breakdown is as follows:

Shortlisting Rating System	
Criteria/Particulars	Total Points
I. Applicable Years of Experience and Track Record of the Consultancy Firm	30
<i>Firm experience</i>	<i>10</i>
<i>Track record in the conduct of similar projects/contracts</i>	<i>10</i>
<i>Client Satisfaction survey and references</i>	<i>10</i>
II. Qualification of Personnel to be assigned to the Project	50
<i>Relevant Professional Degrees</i>	<i>5</i>
<i>Cumulative years of experience</i>	<i>10</i>
<i>Specialized professional trainings</i>	<i>15</i>
<i>Previous similar engagements in consultancy projects</i>	<i>20</i>
III. Current Number of Ongoing Projects	20
<i>Resource availability (availability of necessary equipment, software, and tools)</i>	<i>5</i>
<i>Number of ongoing projects</i>	<i>15</i>
Total	100

1.1 Rating criteria for the firm experience

Firms that meet the minimum requirements as stated in **Section 7.1** shall be rated based on the following:

Criteria	Unit of Measure	Points		
		5	8	10
Firm Experience	Number of years	5	6 to 10	>10
Track record in the conduct of similar studies/projects	Number of completed similar projects	3	4 to 10	>10

Client Satisfaction Survey/References	Number of surveys/references with satisfactory rating	1 client	2 to 3 distinct clients	>3 distinct clients
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1.2 Rating Criteria for the Personnel to be Assigned to the Project (50 points)

The nominated experts shall be rated in four (4) areas: relevant professional degrees, cumulative years of experience, specialized professional training, and previous engagement in consultancy projects. The rating of each bid for each area shall be the average rating of all experts identified in the bid. A rating of 0 points in any of the areas for any identified expert means the automatic disqualification of the bid.

1.2.1 Relevant Professional Degrees - 5 Points

Criteria	Unit of Measure	Points		
		2	3	5
Relevant Professional Degree	Highest Level of Educational Attainment	BS	MS	PhD

- *Nominated experts that do not have a degree in the field as specified in 7.2 shall be given 0 points.*

- *Nominated experts with master's or doctorate degrees shall be rated according to the highest level they attained in the field as specified in 7.2*

e.g., if a nominated expert has a doctorate, but only their bachelor's and master's degree are in the field as specified in 7.2, then their rating would be 1 or 3

- *If a nominated expert, despite having a non-related bachelor's degree, has a master's and or doctorate that is/are related to the field as specified in 7.2, then they shall be rated according to the highest level they attained in the field as specified in 7.2.*

e.g., if a nominated expert has a bachelor's degree that is not compliant to what is specified in 7.2, but has a doctorate that is compliant, then their rating would be 5

1.2.2 Cumulative Years of Experience - 10 Points

The overall points for years of experience will be

calculated as average of the individual points of key personnel.

Criteria	Unit of Measure	Points		
		5	8	10
Strategic Advisor	Number of years of professional experience	15	>15 to 20	>20
Market Analysis & Business Development Consultant		15	>15 to 20	>20
Operational Framework & Technology Integration Consultant		15	>15 to 20	>20
Energy Sourcing & Financial Consultant		15	>15 to 20	>20

1.2.3 Specialized Professional Trainings - 15 Points

The overall points for the specialized professional training will be calculated as average of the individual points of key personnel.

Criteria	Unit of Measure	Points		
		5	10	15
Strategic Advisor	Number of trainings related to the role attended	1	2 to 3	>3
Market Analysis & Business Development Consultant		1	2 to 3	>3
Operational Framework & Technology Integration Consultant		1	2 to 3	>3
Energy Sourcing & Financial Consultant		1	2 to 3	>3

1.2.4 Previous Similar Engagement in Consultancy Projects - 20 Points

Criteria	Unit of Measure	Points		
		10	15	20
Strategic Advisor	Number of Completed Consultancy	1	2 to 5	>5
Market Analysis & Business Development		1	2 to 5	>5

Consultant	Projects			
Operational Framework & Technology Integration Consultant		1	2 to 5	>5
Energy Sourcing & Financial Consultant		1	2 to 5	>5

1.3 Rating criteria for Current Workload Relative to Capacity (20 points)

In this criterion, bidders will be rated based on the following:

1.3.1 Resource Availability - 5 Points

Bidders must ensure that any of their nominated personnel to be assigned in the project must have the capability to operate the resources stipulated in the rating table below.

Criteria	Unit of Measure	Points	
		3	5
Resource Availability	Capability to Operate Essential Tools Necessary to Complete the Project	Capability to operate the following tools: <ul style="list-style-type: none"> Suite of Productivity Software Any kind of Business Intelligence and Analytics software Any kind of Energy Management software 	Availability of additional tools beyond those listed earlier

1.3.2 Number of Ongoing Projects - 15 Points

For this criterion, bidders shall be rated based on their number of ongoing projects.

Criteria	Unit of Measure	Points		
		10	13	15
Firm's Ongoing Projects	No. of Ongoing Projects	>5	2 to 5	>2

Section IV. Eligibility Submission Forms

Eligibility Documents Submission Form – ANNEX “A”	23
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Statement of Ongoing Contracts and Awarded But Not yet Started Contract - ANNEX "E"	29

ELIGIBILITY DOCUMENTS SUBMISSION FORM

[Date]

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

In connection with your Request for Expression of Interest dated *[insert date]* for *[Title of Project]* under *[Reference No.]*, *[Name of Consultant]* hereby expresses interest in participating in the eligibility and short listing for said Project and submits the attached eligibility documents in compliance with the Eligibility Documents therefor.

In line with this submission, we certify that:

- a) *[Name of Consultant]* is not blacklisted or barred from bidding by the GOP or any of its agencies, offices, corporations, or LGUs, including foreign government/foreign or international financing institution whose blacklisting rules have been recognized by the Government Procurement Policy Board, and that each of the documents submit; and
- b) Each of the documents submitted herewith is an authentic copy of the original, complete, and all statements and information provided therein are true and correct.

We acknowledge and accept the Procuring Entity’s right to inspect and audit all records relating to our submission irrespective of whether we are declared eligible and short listed or not.

Yours sincerely,

Signature
Name and Title of Authorized Signatory
Name of Consultant
Address
Email Address

STATEMENT OF THE CONSULTANT’S NATIONALITY

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

In compliance with the requirements of the **Philippine National Oil Company**, for the **[Project Title]** under **[Reference No.]**, I/We hereby declare the following:

1. [Select one and delete the rest]

[If domestic entity bidder] That (Name of Bidder) is a domestic *sole proprietorship/partnership/corporation/joint venture* organized or formed under the laws of the Philippines;

[If foreign entity bidder] That (Name of Bidder) is a foreign *sole proprietorship/partnership/corporation/joint venture* organized or formed under the laws of the (Name of Country);

[If foreign entity bidder] That (Name of Bidder) is registered with the Securities and Exchange Commission and/or any agency authorized by the laws of the Philippines;

2. That the following are/is the proposed Consultants:

Name of Proposed Consultant	Proposed Position	Nationality	Proof of Identification
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			

3. That attached herewith are the Curriculum Vitae of the abovementioned personnel (*Annex/es _____*); and

Very truly yours,

Signature: _____

Name and Title of Authorized Signatory: _____

Name of Consultant/Company: _____

Address: _____

Email Address: _____

Contact Nos: _____

ANNEX “C”

FORMAT OF CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF

Proposed Position						
Personal Information						
Name of Staff						
Address			Contact No.		Email Address	
Date of Birth		Citizenship		Civil Status		
Project Experience (start from the current employment, add rows if necessary) Similar and Related to the Project						
EMPLOYER (AGENCY / COMPANY NAME) (Write in Full)	CLIENT (COMPANY NAME) (Write in Full)	PROJECT TITLE With Brief Project Description (Write in Full)	PROJECT DURATION (MM/DD/YYYY)		POSITION TITLE (Write in Full)	DETAILED JOB DESCRIPTION
			START	END		
Relevant Training (start from the most recent, add rows if necessary)						
Course Title	Inclusive Dates		Location	No. of Hours	Conducted / Sponsored by	
	From	To				
Education (start from the most recent, add rows if necessary)						
School	Inclusive Dates		Degree Course (Indicate if Completed)	Scholarships / Academic Honors Received		
	From	To				

Technical Expertise	
Database	
Operating Systems	
Application Software	
Professional Licenses, Certificates, Other Credentials	
Title	Date Received

Certification:

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

_____ Date: _____
[Printed Name and Signature of staff member] *MM/DD/YYYY*

CERTIFIED CORRECT:

_____ Date: _____
[Printed Name and Signature of authorized representative of the firm] *MM/DD/YYYY*

STATEMENT OF COMPLETED CONTRACTS

This is to certify that _____ (consultant) _____ has the following completed contracts:

PROJECT NAME (including NAME, ADDRESS OF CLIENT, CONTACT NO.)	DATE OF CONTRACT (MM/DD/YYYY)	TYPE OF CONTRACT (BRIEF PROJECT DESCRIPTION)	START DATE (MM/DD/YYYY)	COMPLETION DATE (MM/DD/YYYY)	AMOUNT OF CONTRACT	CONSULTANT’S ROLE (DESCRIPTION OF ACTUAL SERVICES PROVIDED)

Name and Signature of Authorized Representative

Date

STATEMENT OF ONGOING CONTRACTS AND AWARDED BUT NOT YET STARTED CONTRACTS

This is to certify that _____ (consultant) _____ has the following ongoing and awarded but not yet started contracts:

DATE OF CONTRACT	CONTRACTING PARTY	NAME OF CONTRACT	TYPE OF CONTRACT	BRIEF DESCRIPTION OF CONSULTING SERVICE	AMOUNT OF CONTRACT	VALUE OF OUTSTANDING CONTRACT	CONSULTANT IS: a. main consultant b. subcontractor c. partner in a JV

Note: If the bidder does not have any on-going project, please state “None” in the form above and include the form in the submission of eligibility requirements.

Name and Signature of Authorized Representative

Date

Terms of Reference

1. Project Description

The Philippine National Oil Company (PNOC), through its Three Arrows Strategy, seeks to establish itself as a Retail Electricity Supplier (RES) serving all contestable Government Agencies in the Philippines. This initiative positions PNOC as a disruptor in the local energy market, encouraging contestable Government Agencies to exercise their right to select an electricity supplier that offers the most economic advantages.

This year, PNOC plans to secure its RES license from the Energy Regulatory Commission (ERC). However, the application process has highlighted several challenges, with the release of the New Omnibus Rules on Customer Choice Programs in the Retail Market by the ERC:

- **Operational Capability:** PNOC lacks an expert with at least 15 years of experience in contracts or negotiations with System Operators (SO), DUs, Generation Companies, or similar entities.
- **Implementation Plan:** A Comprehensive Implementation Plan is needed to serve as the basis for the required capital expenditure (CAPEX) to operate the RES business. Additionally, key inputs from this plan will be used in RES Form 3 and its annexes as part of the ERC application process.

2. Objectives of the Engagement

In view of the above, PNOC plans to hire a Consultant with the necessary expertise to:

- Prepares Comprehensive Implementation Plan for the operation of PNOC's RES business.
- Serve as PNOC's designated expert for the RES license application.
- Provide strategic advice for the successful operation of the RES business.

This engagement will equip PNOC with the tools and expertise to navigate regulatory requirements, operationalize its RES business, and fulfill its mission to transform the energy procurement landscape for Government Agencies.

3. Approved Budget for the Contract (ABC)

PNOC has an approved corporate budget in the amount of **One Million Eight Hundred Thousand Pesos (PHP 1,800,000.00)** for this engagement.

4. Scope of Works

The Consultant's responsibilities encompass the following key tasks:

- 4.1. Prepares the Comprehensive Implementation Plan for the Operation of PNOC's RES Business

This must address all critical aspects of establishing PNOC as a Retail Electricity Supplier (RES), including:

- 4.1.1. Market Analysis
 - 4.1.1.1. Demand Analysis:
 - a. Assessment of current market trends, including the adoption of renewable energy, retail competition, and open access.
 - b. Profiling of the target market, with an emphasis on contestable Government Agencies.
 - c. Demand growth projections based on historical trends and future developments.
 - 4.1.1.2. Competitive Landscape:
 - a. Analysis of existing RES providers, pricing strategies, and market share.
 - b. SWOT analysis to evaluate PNOC's strengths, weaknesses, opportunities, and threats.
 - 4.1.1.3. Customer Insights:
 - a. Identification of customer needs, preferences, and decision-making criteria.
 - b. Analysis of customer pain points and potential solutions offered by PNOC.
- 4.1.2. Regulatory Compliance
 - 4.1.2.1. Detailed outline of the requirements for obtaining an RES license from the Energy Regulatory Commission (ERC).
 - 4.1.2.2. Identification of compliance gaps and recommendations for addressing them.
 - 4.1.2.3. Timeline and cost analysis for meeting regulatory requirements.
- 4.1.3. Business Model Development
 - 4.1.3.1. Pricing Mechanism
 - a. Cost recovery and competitive pricing strategies
 - b. Compliance with ERC-approved rates
 - 4.1.3.2. Revenue Streams
 - a. Power supply contracts
 - b. Ancillary services (e.g., energy audits, training programs)
 - 4.1.3.3. Risk Management
 - a. Identification of potential risks (e.g., policy changes, non-payment)
 - b. Mitigation strategies (e.g., insurance, flexible contracts)
- 4.1.4. Operational Framework
 - 4.1.4.1. Organizational Structure
 - a. Roles and responsibilities of PNOC's RES team
 - b. Coordination with other PNOC departments (e.g., legal, finance)
 - 4.1.4.2. Processes and Workflows
 - a. Customer onboarding and service provision
 - b. Billing and payment systems

- c. Data management and reporting
 - 4.1.4.3. Integration with Energy Systems
 - a. Coordination with WESM and grid operators
 - b. Integration of renewable energy sources
 - 4.1.5. Technology and Infrastructure Plan
 - 4.1.5.1. IT and Energy Management Systems
 - a. Development of robust customer management platforms
 - b. Tools for monitoring and optimizing energy supply
 - 4.1.5.2. Renewable Energy Integration
 - a. Facilitation of solar, wind, or hydroelectric power sources
 - b. Smart metering and real-time tracking of consumption
 - 4.1.6. Training and Capacity Building Plan
 - 4.1.6.1. Staff Training Programs
 - a. Technical knowledge in energy supply and demand management
 - b. Updates on energy laws and market trends
 - 4.1.6.2. Client Education
 - a. Workshops and seminars for government agencies on energy savings
 - b. Dissemination of best practices in energy consumption
 - 4.1.7. Monitoring and Evaluation Plan
 - 4.1.7.1. Key Performance Indicators (KPIs)
 - a. Customer satisfaction ratings
 - b. Achievement of renewable energy targets
 - c. Financial performance metrics
 - 4.1.7.2. Feedback Mechanisms
 - a. Regular surveys and consultation with government clients
 - b. Mechanisms for addressing complaints and suggestions
 - 4.1.7.3. Continuous Improvement
 - a. Regular audits of processes and systems
 - b. Adoption of new technologies and practices
 - 4.1.8. Implementation Timeline
 - 4.1.8.1. Short-term Goals (0-12 months)
 - a. Licensing and accreditation
 - b. Initial government client acquisition
 - 4.1.8.2. Medium-term Goals (1-3 years)
 - a. Expansion of client base
 - b. Establishment of robust IT systems
 - 4.1.8.3. Long-term Goals (3-5 years)
 - a. Market leadership in the government sector
 - b. Integration of advanced technologies and renewable energy sources

- 4.1.9. Budget and Financial Projections
 - 4.1.9.1. Cost Estimates
 - a. Licensing and operational setup
 - b. Marketing and outreach expenses
 - 4.1.9.2. Revenue Projections
 - a. Anticipated revenue from government contracts
 - b. Break-even analysis
 - 4.1.10. Conclusion
 - 4.1.10.1. Summary of PNOC’s vision for its RES business
 - 4.1.10.2. Commitment to sustainability, compliance, and service excellence.
- 4.2. Advisory and expert support activities to the PNOC RES team:
- 4.2.1. Provide guidance and expert consultations to the PNOC RES team as needed, ensuring they receive the necessary support to address challenges, make informed decisions, and achieve their objectives effectively.
 - 4.2.2. Accompany the PNOC RES team and assist them in responding to inquiries from suppliers and clients during coordination and clarification meetings.
 - 4.2.3. Facilitate capacity-building activities for the PNOC RES team during the engagement period (i.e., the Consultant to identify the necessary capacity-building activities based on the PNOC RES team's needs).

5. Deliverables, Commencement Date and Period of Implementation

The project will commence upon the issuance of the Notice to Proceed (NTP) and will have a total duration of 270 calendar days. Upon receiving the NTP, the Consultant will be registered as one of PNOC’s key personnel, recognized for expertise in operating an RES business or engaging in market trading during PNOC’s RES license application with the Energy Regulatory Commission (ERC).

The main deliverables for this engagement are the following:

- 5.1. **Comprehensive Implementation Plan:** This document should contain key inputs stipulated in **Section 4.1 of the TOR**. Multiple iterations may be required based on PNOC’s requests and ongoing discussions between PNOC and the Consultant, as this will run parallel to PNOC’s RES application activities.
- 5.2. **Monthly engagement reports:** These reports will summarize key interactions between PNOC and the Consultant for each month, except for the final engagement report, which will provide an overall summary of the engagement period. Monthly reports must be submitted on or before every 30 days (i.e., from the issuance of NTP), while the final report is due five days before the end of the engagement period.
- 5.3. **Training Materials:** The Consultant must provide all the training materials upon satisfactory completion of the capacity-building activities designed to address the PNOC RES team's needs for RES business implementation.

The Consultant must submit all deliverables to PNOC in physical copies as the official submission. Additionally, electronic copies of all deliverables must be provided in advance. Any necessary corrections or modifications requested by PNOC, along with any associated costs or delays, shall be the Consultant's responsibility. PNOC reserves the right to reproduce the deliverables as needed.

6. Payment Terms

Milestone payments will be adopted where the payment shall be released upon reaching the specific project milestone, to ensure that these conform to the requirements set for the purpose.

The payments are subject to the usual government accounting and auditing requirements. Hence, the Contractor is expected to be familiar with the Government Accounting and Auditing Manual (GAAM).

Project Milestone*	Deadline (from Issuance Date of NTP)	Percentage of Payment
Acceptance of the following documents by the Proponent:		
Draft Comprehensive Implementation Plan	Day 45	20%
Final Comprehensive Implementation Plan	Day 90	40%
Training Materials for the Capacity-Building Activities Conducted	Day 210	30%
Final Engagement Report	Day 270	10%

*Retention Money/Bond: 10% for every progress billing.

7. Minimum Qualifications

The Consultant must have the following qualifications:

- 7.1. **Firm Experience:** The Consultant shall have at least three (3) years of relevant experience in providing energy consulting services to clients of various industries, including but not limited to Utility Bill Analysis, Power Procurement, Energy Management, Energy Audit, System Loss Management, Power Quality Solutions, CAPEX Planning, Distribution Impact Study & Distribution Asset Study, Power System Analysis, and other aspects of Retail Electricity Supply (RES) Business.
- 7.2. **Key Personnel:** The Consultant shall provide a team of experts with the required qualifications to carry out the scope of work. The allocation of manhours to key personnel is at the Consultant's discretion, provided the scope of work is completed within the specified timeline. Any replacement of personnel shall be subject to PNOC's prior approval.

PERSONNEL	QTY	QUALIFICATIONS	EXPERIENCE
Strategic Advisor	1	Must be a registered Electrical Engineer;	Minimum fifteen (15) years of experience in

		Master's or Doctorate Degree in any related field is an advantage	the energy sector, with specialization in strategic planning, regulatory compliance, system automation, and energy policy development and other ERC's requirements.
Market Analysis & Business Development Consultant	1	Must have a Bachelor's Degree in Engineering or any finance-related courses (e.g., Business Administration, Economics, Accountancy, etc.); Master's or Doctorate Degree in any related field is an advantage	Minimum fifteen (15) years of experience in the energy sector, with specialization in utility asset planning, system loss reduction, net-metering, business development, market analysis and pricing strategies and other ERC's requirements.
Operational Framework & Technology Integration Consultant	1	Must have a Bachelor's Degree in Engineering; Master's or Doctorate Degree in any related field is an advantage	Minimum fifteen (15) years of experience in the energy sector, with specialization in energy efficiency, power quality assessments, energy audits, and integrating energy-efficient technologies into operational frameworks and other ERC's requirements.
Energy Sourcing & Financial Consultant	1	Must have a Bachelor's Degree in Engineering or any finance-related courses (e.g., Business Administration, Economics, Accountancy, etc.); Master's or Doctorate Degree in any related field is an advantage	Minimum fifteen (15) years of experience in the energy sector, with specialization in energy sourcing, power supply agreements, and financial modeling, energy contracts management and forecasting energy costs and other ERC's requirements.

In this engagement, the key personnel will have the following roles:

- **Strategic Advisor:** This expert will provide high-level strategic inputs, ensuring that the RES business aligns with both local and international energy regulatory frameworks. He/she will also advise on regulatory compliance and industry standards.
- **Market Analysis & Business Development Consultant:** This expert will contribute key insights into market trends, demand growth projections, and the identification of opportunities within the government market. He/she will also provide guidance on developing a sustainable and competitive business model.
- **Operational Framework & Technology Integration Consultant:** This expert will provide input on developing the operational framework for the RES, including technology integration and energy efficiency measures. His/her focus will be on ensuring optimal operations and sustainable infrastructure.
- **Energy Sourcing & Financial Consultant:** This expert will advise on energy sourcing strategies, including power supply agreements and financial projections for the RES business. He/she will focus on forecasting energy costs and ensuring financial sustainability.

8. Evaluation Criteria

Bidders are to be subjected to the eligibility check and short-listing process provided under RA 9184 and its Implementing Rules and Regulations for consulting services.

The selection of the Consultant will be based on two (2) stages: **Shortlisting** and **Evaluation of Bids**.

8.1. Shortlisting

A maximum of three qualifying bids with at least 50 points out of 100 shall be shortlisted in the shortlisting round. The term “Similar Projects/Contracts” shall be defined as “Provision of Services Related to Energy Solutions or Retail Electricity Supply Business”.

The breakdown is as follows:

Shortlisting Rating System	
Criteria/Particulars	Total Points
I.	A
pplicable Years of Experience and Track Record of the Consultancy Firm	30
<i>Firm experience</i>	<i>10</i>
<i>Track record in the conduct of similar projects/contracts</i>	<i>10</i>
<i>Client Satisfaction survey and references</i>	<i>10</i>
II.	50
Qualification of Personnel to be assigned to the Project	50
<i>Relevant Professional Degrees</i>	<i>5</i>

<i>Cumulative years of experience</i>	<i>10</i>
<i>Specialized professional trainings</i>	<i>15</i>
<i>Previous similar engagements in consultancy projects</i>	<i>20</i>
III. Current Workload Relative to Capacity	20
<i>Resource availability (availability of necessary equipment, software, and tools)</i>	<i>5</i>
<i>Number of ongoing projects</i>	<i>15</i>
Total	100

8.1.1. Rating criteria for the firm experience (30 points)

Firms that meet the minimum requirements as stated in **Section 7.1** shall be rated based on the following:

Criteria	Unit of Measure	Points		
		5	8	10
Firm Experience	Number of years	5	6 to 10	>10
Track record in the conduct of similar studies/projects	Number of completed similar projects	3	4 to 10	>10
Client Satisfaction Survey/References	Number of surveys/references with satisfactory rating	1 client	2 to 3 distinct clients	>3 distinct clients

8.1.2. Rating Criteria for the Personnel to be Assigned to the Project (50 points)

The nominated experts shall be rated in four (4) areas: relevant professional degrees, cumulative years of experience, specialized professional training, and previous engagement in consultancy projects. The rating of each bid for each area shall be the average rating of all experts identified in the bid. A rating of 0 points in any of the areas for any identified expert means the automatic disqualification of the bid.

8.1.2.1. Relevant Professional Degrees - 5 Points

Criteria	Unit of Measure	Points		
		2	3	5
Relevant Professional Degree	Highest Level of Educational Attainment	BS	MS	Ph D

- *Nominated experts that do not have a degree in the field as specified in 7.2 shall be given 0 points.*

- *Nominated experts with master's or doctorate degrees shall be rated according to the highest level they attained in the field as specified in 7.2*

e.g., if a nominated expert has a doctorate, but only their bachelor's and master's degree are in the field as specified in 7.2, then their rating would be 1 or 3

- *If a nominated expert, despite having a non-related bachelor's degree, has a master's and or doctorate that is/are related to the field as specified in 7.2, then they shall be rated according to the highest level they attained in the field as specified in 7.2.*

e.g., if a nominated expert has a bachelor's degree that is not compliant to what is specified in 7.2, but has a doctorate that is compliant, then their rating would be 5

8.1.2.2. Cumulative Years of Experience - 10 Points

The overall points for years of experience will be calculated as average of the individual points of key personnel.

Criteria	Unit of Measure	Points		
		5	8	10
Strategic Advisor	Number of years of professional experience	15	>15 to 20	>20
Market Analysis & Business Development Consultant		15	>15 to 20	>20
Operational Framework & Technology Integration Consultant		15	>15 to 20	>20
Energy Sourcing & Financial Consultant		15	>15 to 20	>20

8.1.2.3. Specialized Professional Trainings - 15 Points

The overall points for the specialized professional training will be calculated as average of the individual points of key personnel.

Criteria	Unit of Measure	Points		
		5	10	15

Strategic Advisor	Number of trainings related to the role attended	1	2 to 3	>3
Market Analysis & Business Development Consultant		1	2 to 3	>3
Operational Framework & Technology Integration Consultant		1	2 to 3	>3
Energy Sourcing & Financial Consultant		1	2 to 3	>3

8.1.2.4. Previous Similar Engagement in Consultancy Projects - 20 Points

Criteria	Unit of Measure	Points		
		10	15	20
Strategic Advisor	Number of Completed Consultancy Projects	1	2 to 5	>5
Market Analysis & Business Development Consultant		1	2 to 5	>5
Operational Framework & Technology Integration Consultant		1	2 to 5	>5
Energy Sourcing & Financial Consultant		1	2 to 5	>5

8.1.3. Rating criteria for Current Workload Relative to Capacity (20 points)

In this criterion, bidders will be rated based on the following:

8.1.3.1. Resource Availability - 5 Points

Bidders must ensure that any of their nominated personnel to be assigned in the project must have the capability to operate the resources stipulated in the rating table below.

Criteria	Unit of Measure	Points	
		3	5
Resource Availability	Capability to Operate Essential Tools Necessary to Complete the Project	Capability to operate the following tools: <ul style="list-style-type: none"> Suite of Productivity Software Any kind of Business Intelligence 	Availability of additional tools beyond those listed earlier

		and Analytics software • Any kind of Energy Management software	
--	--	--	--

1.1.1.1. Number of Ongoing Projects - 15 Points

For this criterion, bidders shall be rated based on their number of ongoing projects.

Criteria	Unit of Measure	Points		
		10	13	15
Firm's Ongoing Projects	No. of Ongoing Projects	>5	2 to 5	>2

1.2. Evaluation of Bids

The technical and financial proposals of the shortlisted bidders shall be evaluated using Quality-Cost Based Evaluation. The rating breakdown shall be as follows:

EVALUATION RATING SYSTEM	
Criteria/ Particulars	Total Points
I. Technical Proposal	80
Technical proposal (<i>Approach and Methodology, Work Plan, Organization and Staffing</i>)	60
Consultant qualification (<i>Firm and Experts' Qualification</i>)	20
II. Financial Proposal	20
Total	100

1.2.1. Technical Proposal Evaluation – 80 points

Shortlisted bidders shall provide documents that would present and prove their technical experience, approach, and methodology on all technical and cost parameters detailing professional inputs and time requirements.

1.2.1.1. Technical Proposal – 60 points

The technical proposal shall have and will be evaluated based on the following components:

a. Technical Approach and Methodology

This part covers the understanding of the objectives of the assignment, the approach to the services, the methodology for

carrying out the activities and obtaining the required outputs, and the degree of detail of said outputs.

In this component, the bidder shall highlight the problems being addressed and their importance and explain the technical approach they would adopt to address them. As to the technical approach, they are to present the methodologies they would adopt and highlight the compatibility of the same to the technical approach they are adopting.

b. Work Plan

This segment contains the proposed main activities, their content and duration, phasing and interrelations, milestones (including interim approvals from PNOC), and delivery dates of the reports.

The proposed work plan should be consistent with **Section 5: Deliverables, Commencement Date and Period of Implementation**, showing an understanding of the TOR and the ability to translate the same into a feasible work plan. A list of the final documents, including reports, drawings, and tables to be delivered as final output, should be included in this component.

c. Organization and Staffing

The proposed structure and composition of the team, with each member's tasks and responsibilities being described.

The rating for the technical proposal shall be as follows:

A. Technical Approach and Methodology		
Rating	Points	Description
Very Good	25	<ul style="list-style-type: none"> ● Clearly demonstrates an efficient and effective approach to addressing the work outlined in the Terms of Reference (TOR). ● Indicates a strong understanding of the assignment's scope. ● Shows excellent knowledge of the assignment and its surrounding conditions. ● Reflects a firm grasp of state-of-the-art solutions and methodologies.
Good	15	<ul style="list-style-type: none"> ● Provides a detailed discussion of the technical approach and methodology. ● Specifically tailored to the TOR's scope of work. ● Demonstrates flexibility to adapt to potential changes during the engagement.

Fair	10	<ul style="list-style-type: none"> • Includes only a general discussion of the proposed approach and methodology. • Adequate but does not fully address the TOR's specific requirements.
------	----	--

B. Work Plan		
Rating	Points	Description
Very Good	20	<ul style="list-style-type: none"> • Clearly defines decision points, sequence, and timing of activities. • Demonstrates an optimized use of resources beyond the requirements of a "Good" rating.
Good	10	<ul style="list-style-type: none"> • Effectively responds to the TOR requirements and is well-explained. • Includes all important activities in the schedule. • Ensures timing is consistent with assignment outputs. • Shows a realistic and logical interrelation among activities, aligned with the proposed approach.
Fair	5	<ul style="list-style-type: none"> • Covers all key activities but lacks detailed explanation. • Contains minor inconsistencies in timing, assignment outputs, and the proposed approach.

C. Organization and Staffing		
Rating	Points	Description
Very Good	15	<ul style="list-style-type: none"> • Fully integrated organization and staffing plan with clear lines of responsibility. • Includes a detailed discussion demonstrating optimized deployment of identified experts.
Good	10	<ul style="list-style-type: none"> • Complete organization and staffing schedule with a detailed description of duties and responsibilities for each expert. • Staffing is aligned with both timing and assignment outputs.
Poor	5	<ul style="list-style-type: none"> • Organization and staffing schedule is adequate but lacks detail and clarity. • Some concerns about the bidder's ability to deliver outputs effectively within the assignment period.

1.2.1.2. Consultant qualification – 20 points

Shortlisted bidders shall be rated based on the **total score during the shortlisting stage**. Rating for this criterion shall be determined using the following formula:

$$\text{Consultant qualification rating} = \frac{\text{Total shortlisting rating of the bidder}}{\text{Maximum shortlisting rating}} \times 20$$

1.2.2. Financial Proposal Evaluation – 20 points

Bids exceeding the identified Approved Budget for the Contract (ABC) will automatically be disqualified.

All ABC-compliant bids shall be ranked, with the lowest bid ranking first and getting the full rating of 20. Rating for other bids (Bidder N) shall be determined using the following formula:

$$\frac{\text{Lowest Financial Bid}}{\text{Financial Bid of Bidder N}} \times 20$$

PNOC shall not be bound to accept the lowest or any other Bid or to assign any reason for non-acceptance or rejection of a bid. PNOC reserves the right to accept any bid in respect of the whole or any portion of the work specified in the submitted bid.

9. Project Timeline

Project Timeline: PNOC'S RES Business		2025															
		April				May				June				July			
Item	Task	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
	PNOC RES Consultant Engagement																
1	Consultation for the Technical, Legal, and Commercial Requirements for the PNOC's RES License Application																
2	Submission of the Requirements for the RES License Application																
3	Completion of the Comprehensive Implementation Plan for Budget Deliberation																
4	2026 RES Budget Deliberation																
5	ERC's Decision on PNOC's RES License Application																

Project Timeline: PNOC'S RES Business		2025																			
		August				September				October				November				December			
Item	Task	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
	PNOC RES Consultant Engagement																				
1	Consultation for the Technical, Legal, and Commercial Requirements for the PNOC's RES License Application																				
2	Submission of the Requirements for the RES License Application																				
3	Completion of the Comprehensive Implementation Plan for Budget Deliberation																				
4	2026 RES Budget Deliberation																				
5	ERC's Decision on PNOC's RES License Application																				

