



**PHILIPPINE NATIONAL OIL COMPANY**

PNOC Building VI, Energy Center

Rizal Drive, BGC, Taguig City

Tel. No.: 8789 - 7662

[www.philgeps.gov.ph](http://www.philgeps.gov.ph) / [www.pnoc.com.ph](http://www.pnoc.com.ph)

**REQUEST FOR QUOTATION / PROPOSAL**

The PHILIPPINE NATIONAL OIL COMPANY (PNOC) through its Bids and Awards Committee (BAC), invites all interested and PhilGEPS-registered suppliers / contractors / consultants to submit quotations / proposals for the following company requirements:

Date : **04 November 2025**  
Project Title : **Training Provider (TP)/ Subject Matter Expert (SME) for Training Program for Sustainable Finance**  
Reference No. : **2025-11-204**  
Total ABC : **PhP 330,000.00**  
Submission Deadline : **07 November 2025 / 09:00 AM**  
Place of Delivery : **PNOC Building VI, Energy Center, BGC, Taguig City**

Accomplished **Price Quotation/Proposal and Compliance Form** together with below listed documentary requirements and information may be submitted via:

**Electronic Mail:** PDF copy to email address:  
[newprocurement@pnoc.com.ph](mailto:newprocurement@pnoc.com.ph)

**Physical Submission** Sealed envelope to **PNOC Procurement Management Division at the above address**

**Documentary Requirements:**

- Mayor's/Business Permit
- PhilGEPS Registration Number
- Notarized Omnibus Sworn Statement - Annex "A" (Unnotarized copy may be submitted prior to submission deadline, but the notarized one shall be submitted after award or before payment)
- BIR Form 2303
- Curriculum Vitae (CV) of Trainer or Subject Matter Expert (SME)
- Price Quotation / Proposal and Compliance Form

**Additional Requirements:**

- Program Proposal with Quotation
- Proof that the TP/ SME has at least two (2) years of demonstrated experience in designing and delivering training programs.
- Proof that the TP/ SME has at least two (2) successfully completed training engagement on Sustainable Finance.

The PNOC reserves the right to accept or reject any or all quotations/proposals or parts thereof, to waive formality therein or to accept such or to award any that are considered most advantageous to the company.

For any clarification, you may contact the Procurement Management Division at (02) 8789-7662 or send email to [newprocurement@pnoc.com.ph](mailto:newprocurement@pnoc.com.ph) / [asalathrop@pnoc.com.ph](mailto:asalathrop@pnoc.com.ph).

Thank you.

  
**ATTY. JOSEPHINE CASSANDRA J. CUI**  
Chairperson  
Bids and Awards Committee

**PRICE QUOTATION / PROPOSAL AND COMPLIANCE FORM**

**Training Provider (TP)/ Subject Matter Expert (SME) for Training Program  
for Sustainable Finance**

| ITEM                             | UM  | TECHNICAL SPECIFICATION/S  | TOTAL AMOUNT (P) |
|----------------------------------|-----|--|------------------|
| 1                                | LOT | <p><b>Training Provider (TP) / Subject Matter Expert (SME)</b> to deliver a comprehensive training on <b>"Sustainable Finance."</b> The program will equip employees with the knowledge, tools and regulatory insights needed to integrate principles into financial and strategic decisions, while supporting the development of Sustainable Financial Action Plans aligned with PNOC's sustainability goals.</p> <p><u>SCOPE/ COVERAGE/ DELIVERABLES</u></p> <ol style="list-style-type: none"> <li>As part of the training program, the TP/SME shall conduct lectures, demonstrations, and practical exercises to enhance PNOC employees' knowledge and skills in "Sustainable Finance (SF)," including core concepts, ESG integration, and practical tools for embedding sustainability into financial and strategic decision making. <ul style="list-style-type: none"> <li>Training Course: <b>"Sustainable Finance"</b></li> <li>Number of Participants: <b>Twenty – Five (25) attendees</b></li> <li>Duration: <b>Two (2) Days; Eight (8) hours/ day</b></li> </ul> </li> <li>Service Provider must submit the following: <ul style="list-style-type: none"> <li><i>Proposed Training Outline</i></li> <li><i>Methodology</i></li> <li><i>Learning Needs Analysis or its equivalent</i></li> <li><i>Training Materials</i></li> <li><i>Comprehensive Terminal Report</i></li> <li><i>Certificate of Completion/ Participation/ Attendance</i></li> </ul> </li> <li>Logistics and transportation shall be at the expense of the Service Provider.</li> </ol> <p>(Please refer to the attached Terms of Reference)</p> |                  |
| Total ABC: <b>Php 330,000.00</b> |     |  |                  |

|                                      |   |
|--------------------------------------|---|
| Total amount of Bid (VAT inclusive): |   |
| Delivery Schedule:                   | To be agreed by PNOC and Service Provider upon issuance of Notice to Proceed (NTP) but <b>not later than November 28, 2025.</b> |
| Delivery Place:                      | PNOC Building VI, Energy Center, BGC, Taguig City   |
| Awarding:                            | Per lot awarding/ one (1) lot   |
| Pricing:                             | Quoted price should be inclusive of VAT and all applicable taxes.   |

**TERMS AND CONDITIONS**

1. Payment Terms: Government Terms - full payment upon completion of delivery/implementation, or subject to the conditions specified in the Scope of Works/Activities or Terms of Reference.
2. All entries shall be typed or written in a clear legible manner.
3. Bidder shall offer one (1) bid only. Alternative bids shall be rejected.
4. All prices offered herein are valid, binding and effective for THIRTY (30) calendar days upon issuance of this document.
5. As a general rule, price quotations to be denominated in Philippine Peso shall include all taxes, duties and/or levies payable.
6. In case of tie quotations, tie breaking shall be on draw lots or toss coin.
7. In case supplier pro forma quotation is submitted, conditions will be governed by the submitted signed Terms of Reference / Technical Specifications Sheet.
8. During evaluation of quotation/proposal, the project proponent may require additional documents to verify, validate and ascertain the compliance of the supplier/contractor or consultant.
9. Liquidated damages shall be imposed pursuant to Section 71.1.4 of the Revised IRR of RA 12009.

We undertake, if our Proposal is accepted, to supply/deliver the goods/services in accordance with the specifications and/or delivery schedule.

We agree to abide by this quotation/proposal for a period of thirty (30) calendar days, which is the price's validity period and it shall remain binding upon us and may be accepted at any time before the expiration of that period.

We acknowledge that failure to seal our proposal/quotation or submitting it late will result in automatic disqualification.

Until a Contract or a Purchase Order is executed, this Quotation/Proposal shall be binding upon us. We understand that you are not bound to accept the lowest or any Proposal you may receive.

**Signature over Printed Name** : \_\_\_\_\_  
 Designation / Position : \_\_\_\_\_  
 Name of Organization : \_\_\_\_\_  
 Address : \_\_\_\_\_  
 \_\_\_\_\_  
 Telephone/Mobile No. : \_\_\_\_\_  
 Email Address : \_\_\_\_\_  
 TIN : \_\_\_\_\_

PhilGEPS Registration Number : \_\_\_\_\_

## **INSTRUCTIONS AND PROCEDURES FOR ONLINE SUBMISSION OF QUOTATIONS/PROPOSALS FOR SMALL-VALUE PROCUREMENT**

1. Interested bidders must submit proposal/quotation in a single portable document format (PDF) via email address [newprocurement@pnoc.com.ph](mailto:newprocurement@pnoc.com.ph)

File format should be:

RFQREFERENCENO\_NAME OF THE COMPANY.pdf  
*Example: RFQ202401001\_XYZCompany.pdf*

Note: RFQ Reference Number is located at the front page of the request for quotation.

Email Format Instructions:

- a. The subject line must indicate the RFQ Reference Number
- b. The email body must include the following details:
  - i. Project Title
  - ii. Name of the company and its authorized representative
  - iii. Contact details such as telephone/mobile number and email address

Proposal/quotation must be in a single PDF file only and must not exceed 25 MB.

2. Bidders will be immediately notified via email of the receipt of the proposal/quotation.
3. Proposal/quotation submitted late based on system timestamp will be automatically disqualified.
4. A bid opening will take place immediately after the deadline through video conferencing. The meeting link will be sent to participating bidders upon request.
5. Upon opening, the BAC shall verify the presence or absence of the specified requirements in the quotation/proposal. All eligible quotations/proposals will undergo further evaluation.
6. The award of contract shall be made to the Lowest Calculated Responsive Quotation or Highest Rated Responsive Bid, which complies with the minimum technical specifications and other terms and conditions. The result will be posted on the website and the official social media sites of PNOC.

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# TERMS OF REFERENCE

|                          |   |
|--------------------------|---|
| <b>Project:</b>          | <b>TRAINING PROVIDER (TP)/SUBJECT MATTER EXPERT (SME)<br/>FOR TRAINING PROGRAM ON SUSTAINABLE FINANCE</b>   |
| <b>Project Location:</b> | PNOC Building VI, Energy Center, Rizal Drive, BGC, Taguig City  |
| <b>Justification:</b>    | The Philippine National Oil Company recognizes the vital role of sustainability and ESG in advancing its mandate for energy security, environmental stewardship, and sustainable development. As sustainable finance gains global traction and regulators like the BSP and SEC push for its adoption, PNOC sees the need to strengthen its workforce's competencies in this area. Building expertise in sustainable finance will enable PNOC to align financial decisions with sustainability goals, comply with regulations, and support the transition to cleaner energy while boosting stakeholder confidence. |

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## Purpose

The Philippine National Oil Company (PNOC) recognizes the increasing importance of embedding sustainability and environmental, social, and governance (ESG) considerations into its core business strategies. As part of its mandate to ensure energy security, environmental stewardship, and sustainable development, PNOC must strengthen the capacity of its workforce to respond to global and local trends in "Sustainable Finance."

Sustainable finance is becoming a global movement, and the Philippines is keeping pace. Regulators like the BSP and SEC are encouraging financial institutions to embed sustainability in their decisions. Globally, these initiatives are pushing organizations to adopt more responsible and forward-looking financial practices.

For PNOC, strengthening competencies in this area is crucial to:

- Align financial decisions with sustainability commitments.
- Support the country's transition to cleaner and more sustainable energy sources.
- Ensure compliance with emerging regulations.
- Build investor and stakeholder confidence.

**Implementation Date:** Schedule to be agreed by PNOC and Service Provider upon issuance of Notice to Proceed (NTP) but **not later than 28 November 2025**.

## Objectives

To enhance PNOC employees' capacity to integrate sustainable finance principles into corporate planning, investment decisions, and operational strategies.

### Specific Objectives:

1. Understand the key concepts, frameworks, and standards of sustainable finance.
2. Analyze the regulatory and policy landscape for sustainable finance in the Philippines and globally.
3. Apply ESG principles in evaluating projects, risks, and investment opportunities.
4. Explore financing instruments and mechanisms that support sustainability goals (e.g., green bonds, sustainability-linked loans).
5. Assess PNOC's current and future projects through a sustainability lens.

6. Develop action points for embedding sustainable finance in PNOC’s planning and reporting processes.

### Scope of Work, Coverage and Deliverables

The TP/SMEs shall perform the following activities and complete the deliverables within the given time frame.

| TRAINING            | ACTIVITIES  | NO. OF PAX | DURATION  |
|---------------------|---|------------|---|
| Sustainable Finance | The SME or Training Provider shall conduct a lecture/presentation, samples, and exercises necessary to enhance the knowledge and competence of the employees of PNOC on “Sustainable Finance” | 25 pax     | Two (2) days;<br>(8) hours/day<br><br>Note:<br>Proposed conduct of the program not later than <b>28 November 2025</b> |

#### I. Pre-Training Requirements:

1. The TP/SMEs shall be highly proficient or an expert in customizing a training design/module appropriate in achieving the objectives of the training course.
  - 1.1 Content Development
    - Cover fundamental and advanced concepts of sustainable finance.
    - Integrate Philippine policies and global frameworks (BSP, SEC, Climate Change Commission, Sustainable Development Goals (SDG), etc.).
    - Include case studies relevant to the energy and oil sector.
    - Provide templates and tools for ESG integration.
2. The TP/SMEs shall develop an interactive program incorporating modern engagement strategies.
3. The TP/SMEs are preferably expected to present the customized training design/module and facilitate a walk-through session to the Personnel Services Division (PSD)-Learning and Development (L&D) Team, at least five (5) working days prior to the actual date of training conduct to ensure that the training objectives will be met.
4. At least five (5) days prior to the scheduled training, the TP/SMEs shall be required to submit to the PSD-L&D Coordinator a soft copy of the Facilitator’s Guide, training modules, handouts/training manual, pre-test and post-test, sample training certificates, and other relevant information materials, including but not limited to those intended for distribution to the participants.

#### II. Actual Training Conduct

1. The TP/SMEs shall prepare and provide all necessary training materials, including training kits, handouts, activity sheets, and assessment tools, ensuring they are appropriate and aligned with the objectives of the learning session.
2. The TP/SMEs shall administer a pre-test and post-test to assess participants' knowledge and skills before and after the training. They shall also provide feedback and conduct assessments as needed.

3. The TP/SMEs are responsible for checking the tests and preparing a comprehensive summary report of the results, which will be included in the terminal report. All results shall be submitted to PSD-L&D for documentation and record-keeping purposes.

### III. Post Training Requirements

The TP/SMEs must submit a comprehensive terminal report along with all required documents specified in this TOR within four (4) weeks following the completion of the training program, or within a timeframe mutually agreed upon with PSD. Failure to submit complete requirements shall be considered sufficient cause to withhold payment processing.

### IV. Qualification and Expertise Required

The TP/SMEs must be a duly recognized professional organization or individual with established expertise in "Sustainable Finance." The following minimum qualifications must be met:

- a) At least two (2) years of demonstrated experience in designing and delivering training programs;
- b) At least two (2) successfully completed training engagements on Sustainable Finance;

### V. Criteria for Technical and Financial Evaluation

The interested bidders shall be evaluated in accordance with the Implementing Rules and Regulations of R.A. 12009. Interested bidders shall submit both the technical and financial proposals, which shall serve as the basis of selection. The technical and financial proposals shall be evaluated based on the weight of 70% and 30% allocation, respectively.

#### I. Technical Proposal (70%)

The interested bidder must submit a detailed proposal outlining their technical experience and training plan, including professional inputs, training agenda and schedule, as well as all associated training requirements.

The proposal shall be based on the following aspects:

##### a. Training Proposal (40%)

The technical proposal will be evaluated on the following aspects:

- The training outline and defined outputs and methodology.

| Criteria for the Technical Proposal   | Points      |
|---|-------------|
| <b>Proposed Training Methodology and Delivery Approach</b>  | <b>(40)</b> |
| Rating: Very Good <ul style="list-style-type: none"> <li>• Demonstrates a deep understanding of Sustainable Finance concepts, principles, and challenges relevant to the training context.</li> </ul> | 40          |

|  |    |
|--|----|
| <ul style="list-style-type: none"> <li>• Presents a highly innovative and effective approach, showing advanced knowledge of tools, frameworks, and best practices.</li> <li>• Methodology is clearly tailored to the project context, with adaptive mechanisms for evolving needs.</li> <li>• Includes original or value-added elements (e.g., case studies, real-life applications, digital tools, community of practice models) that enhance training quality and learning outcomes.</li> <li>• Provides detailed, realistic strategies for improving the impact, sustainability, and scalability of the Sustainable Finance training.</li> </ul>  |    |
| <p>Rating: Good</p> <ul style="list-style-type: none"> <li>• Provides a clear, well-structured methodology that is relevant to the training course objectives.</li> <li>• The proposed approach is specific to Sustainable Finance, showing a solid understanding of the subject matter and key issues.</li> <li>• Demonstrates flexibility to adapt to potential challenges or changes during implementation.</li> <li>• Includes contextualized examples or tools aligned with the course goals and participant needs.</li> <li>• Covers key Sustainable Finance elements such as knowledge capture, sharing, retention, and organizational learning.</li> </ul>   | 30 |
| <p>Rating: Fair</p> <ul style="list-style-type: none"> <li>• Presents a generic or partially tailored methodology that could apply to multiple types of training without sufficient Sustainable Finance-specific focus.</li> <li>• Demonstrates only a basic or surface-level understanding of Sustainable Finance and its practical application.</li> <li>• Offers limited adaptation to the context, learner needs, or expected outcomes of the Sustainable Finance course.</li> <li>• Key aspects such as knowledge assessment methods, feedback mechanisms, or learning sustainability strategies are not clearly developed.</li> <li>• Lacks innovation or reflection on the interconnectedness of Sustainable Finance issues, such as organizational culture, technology use, or leadership in Sustainable Finance.</li> </ul> | 20 |
| <p>Rating: Poor</p> <ul style="list-style-type: none"> <li>• The methodology is vague, incomplete, or inappropriate for the Sustainable Finance training context.</li> <li>• Fails to demonstrate understanding of Sustainable Finance concepts or the training’s objectives and audience.</li> <li>• Critical elements are missing (e.g., no explanation of knowledge capture methods, no learning evaluation plan).</li> <li>• Contains inconsistencies or misinterpretations of the scope and purpose of the training.</li> <li>• Does not propose any measurable outcomes or improvement strategies related to knowledge sharing or application.</li> </ul>  | 10 |



**b. Subject Matter Expert (SME) (30%)**

The Subject Matter Expert will be evaluated on the following aspects:

- Training experience and qualifications according to the profile requirements

The technical proposal by the consultants shall be rated based on the following criteria and using the corresponding numerical weights:

| <b>Qualification of Personnel</b>   | <b>(18)</b>                         |
|---|-------------------------------------|
| <p>1. Education</p> <ul style="list-style-type: none"> <li>• Masteral</li> <li>• Masteral units (at least 12 units completed)</li> <li>• Graduate of Bachelor's Degree - preferably in the following fields: Finance/Accounting, Economics, Bus. Administration/Management, Environmental Science or Management, Sustainable Studies, Development Studies/Public Policy or Engineering (with sustainability or energy background)</li> <li>• Graduate of other degrees</li> </ul> | <p>9</p> <p>8</p> <p>7</p> <p>6</p> |
| <p>2. Relevant trainings attended (based on CV)</p> <ul style="list-style-type: none"> <li>• At least 40 hours</li> <li>• At least 30 hours but less than 40 hours</li> <li>• At least 20 hours but less than 30 hours</li> </ul>   | <p>9</p> <p>8</p> <p>7</p>          |
| <b>Experience and Capability of SME or Training Provider</b>  | <b>(12)</b>                         |
| <p>3. Years in active practice/in operation</p> <ul style="list-style-type: none"> <li>• At least 4 years</li> <li>• At least 3 years but less than 4 years</li> <li>• At least 2 years but less than 3 years</li> </ul>  | <p>6</p> <p>5</p> <p>4</p>          |
| <p>5. Relevant Training Engagement in Sustainable Finance</p> <ul style="list-style-type: none"> <li>• More than three (3) completed training engagement</li> <li>• Three (3) completed training engagement</li> <li>• Two (2) completed training engagement</li> </ul>   | <p>6</p> <p>5</p> <p>4</p>          |

## **II. Financial Proposal**

PNOC shall require a detailed financial proposal for the defined outputs and methodology. The final score for the Financial Proposal shall be computed as follows:

$$SF = 0.30 \times F1/F$$

Note: SF is the financial score of the Financial Proposal under consideration  
F1 is the lowest Financial Proposal  
F is the Financial Proposal under Consideration

The final rating shall be the total of the Technical Score (TS) and Financial Score (FS), and the TP/SMEs must acquire a total of at least 70 points to qualify.

## **VI. Terms of Payment**

Payment shall be charged against the approved 2025 Corporate Operating Budget (COB). The TP/SMEs are expected to adhere strictly to the agreed schedule of outputs and deliverables, and are required to submit a Terminal Report upon completion of the engagement.

## **VII. Approved Budget for the Contract**

**Three Hundred Thirty Thousand Pesos (PhP 330,000.00)** inclusive of all applicable taxes and all other expenses.

## **VIII. Data Privacy and Non-Disclosure Agreement**

The TP/SMEs shall conform to the Data Privacy Act and its related issuances, and any or all information that the TP/SMEs may acquire, create, determine, discover and submit, including but not limited to the agreed deliverables and reports, shall be deemed property of PNOC and shall be subject to non-disclosure to any party without prior written approval of PNOC.