



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

# **PHILIPPINE BIDDING DOCUMENTS**

**Project Title : Preparatory Study and Conceptual Design  
for the Offshore Wind Integration Port  
(OSWIP)**

**REI No. : 2024-07-088**

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# **Preparatory Study and Conceptual Design for the Offshore Wind Integration Port (OSWIP)**

**REI No.: 2024-07-088**

# 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](http://www.pnoc.com.ph)  
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### REQUEST FOR EXPRESSION OF INTEREST

#### Preparatory Study and Conceptual Design for the Offshore Wind Integration Port (OSWIP)

##### Request for Expression of Interest No. 2024-07-088

1. The **PHILIPPINE NATIONAL OIL COMPANY (PNOC)**, through the **2024 Approved Corporate Operating Budget** intends to apply the sum of Five Million Two Hundred Fifty Thousand Pesos (PhP 5,250,000.00) being the Approved Budget for the Contract (ABC) to payments under the contract for **Preparatory Study and Conceptual Design for the Offshore Wind Integration Port (OSWIP)**. 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 **Preparatory Study and Conceptual Design for the Offshore Wind Integration Port (OSWIP)**. Eligibility documents of interested consultants must be duly received by the BAC Secretariat on or before **August 15, 2024 (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 **August 08, 2024** 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 **Five Thousand Two Hundred Pesos (PhP5,200.00)**.

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 on **August 15, 2024 (11:30AM)** 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 *top three (3)* prospective bidders who will be entitled to submit bids. The criteria and rating system for short listing are:

- a. *Firm Rating* : 50%
- b. *Nominated Key Experts Rating* : 40%
- c. *Ongoing Consultancy Projects* : 10%

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-Five Percent (85%)* and Financial Proposal is *Fifteen Percent (15%)*. 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 Ninety (90) 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 – 7757  
Fax Nos.: 8812 – 6041 / 8840 – 1440  
Email: [cfc\\_melo@pnoc.com.ph](mailto:cfc_melo@pnoc.com.ph) / [procurement@pnoc.com.ph](mailto:procurement@pnoc.com.ph)  
Website: [www.pnoc.com.ph](http://www.pnoc.com.ph) / [www.philgeps.gov.ph](http://www.philgeps.gov.ph)

  
for: **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><b>a. Commercial Potential.</b> To conduct a detailed review of the local Offshore Wind Market and Project Pipeline, and identify the potential market share this facility could capture within its geographic reach. This includes identifying potential port competitors and assessing the facility's competitive position relative to these competitors. The resulting market capture analysis will be translated into a port activity forecast, serving as an input for the Business Model Assessment (scope h).</p> <p><b>b. Design Report and its Basis.</b> To establish port requirements considering Philippine setting as a Basis of Design report for an integration port to capture the market for the expected fixed bottom and floating foundation types. The Basis of Design report shall be responsive to the requirements of existing developers with awarded Offshore Wind Energy Service Contracts within the 120 nautical miles from the port.</p> <p><b>c. Development options.</b> Conduct site visits to perform a visual inspection of the existing facilities, collect relevant site data, and prepare development options for the project.</p> <p><b>d. Facility Layouts.</b> Prepare facility layouts which consider logistics flow of components, dimensions and location of areas for inbound quay, storage areas, assembly areas, as well as inbound quay requirements for:</p> <ul style="list-style-type: none"> <li>i. Fixed bottom staging/construction facility</li> <li>ii. Floating foundation assembly facility and wet storage</li> <li>iii. Floating foundation marshalling and integration facility</li> <li>iv. Other relevant facility setup based on the market capture.</li> </ul> <p><b>e. Visualization.</b> Prepare 3D visualizations of the facility which includes:</p> <ul style="list-style-type: none"> <li>i. A digital 3D model file that can be manipulated and viewed from different angles using software tools.</li> <li>ii. A dynamic, animated video walkthrough of the facility.</li> <li>iii. A physical, miniature version of the facility (Scale 1:500).</li> </ul> <p><b>f. Cost Estimate.</b> Prepare cost estimate for Capital and Operational Costs.</p> <p><b>g. E&amp;S risks and Measures.</b> Perform environmental and social scan and identify main project risks and potential mitigation measures.</p> <p><b>h. Business Model Assessment.</b> Identification of the revenue potential</p>



	<p>resulting from offshore wind activities for the facility. This needs to be based on the feasible port role in offshore wind for this facility, the Capital and Operational Cost estimated and the preferred operating model / governance structure. A basic business case performance and financial model study is required to determine the main project financial parameters like the Return of Investment (ROI) and Net Present Value (NPV) and any other indicators deemed relevant for the study.</p> <p>The financial model needs to consider 1) three forecast scenarios (low, base, high case), 2) the financial break-even point for this facility, 3) benchmarked port tariff rates, 4) the potential funding gap for the facility; and (4) others as maybe deemed necessary.</p> <p><b>i. Investor Memorandum Pack.</b> The Consultant shall prepare a comprehensive and concise Investor Memorandum Pack for the OSWIP project, limited to a maximum of 10 pages. This pack will summarize the key deliverables outlined in items a to h. Additionally, the Consultant will identify potential national and international investors for an investment roadshow. The Investor Memorandum Pack shall be professionally bound in a high-quality presentation folder, made of durable, eco-friendly materials. The pages will be printed on premium, 100gsm matte-finish paper to ensure clarity and durability. The Consultant shall submit 50 copies of the approved memorandum pack and provide an electronic, editable copy for further use and distribution.</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)	<p><i>Acceptable proof of satisfactory completion of completed contracts, either of the following:</i></p> <p><i>a. Certificate of Completion / Acceptance</i></p> <p><i>b. Official Receipt</i></p>
4.2	Each prospective bidder shall submit <b>one (1) original and two (2) copies</b> of its eligibility documents.
(c)	<p><i>Bids and Awards Committee of the Procuring Entity concerned with the Project.</i></p> <p><b>ATTY. JOSEPHINE CASSANDRA J. CUI</b>  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)	<b><i>Preparatory Study and Conceptual Design for the Offshore Wind Integration Port (OSWIP)</i></b>

	Request for Expression of Interest No. 2024-07-088																						
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>August 15, 2024. (10:00 AM)</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>August 15, 2024. (11:30 AM)</i></p>																						
9.1	Similar contracts shall refer to <i>Consultancy Contract for the Preparatory Study and Conceptual Design of Offshore Wind Port.</i>																						
9.2	<p><i>Detailed set of criteria and rating system to be used for the short listing of consultants.</i></p> <p style="text-align: center;"><b>Criteria for Short Listing of Prospective Bidders</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">Criteria/ Particulars</th> <th style="text-align: center;">Maximum number of points that could be awarded to a bid</th> </tr> </thead> <tbody> <tr> <td colspan="2"><b>I. Firm Rating</b></td> </tr> <tr> <td style="text-align: center;">Years of experience in consultancy services</td> <td style="text-align: center;">20</td> </tr> <tr> <td style="text-align: center;">Number of similar completed consultancy contract for Offshore Wind Ports</td> <td style="text-align: center;">20</td> </tr> <tr> <td style="text-align: center;">Number of relevant completed consultancy contract for Maritime/ Ports Projects</td> <td style="text-align: center;">10</td> </tr> <tr> <td colspan="2"><b>II. Nominated Key Experts Rating</b></td> </tr> <tr> <td style="text-align: center;">Education</td> <td style="text-align: center;">10</td> </tr> <tr> <td style="text-align: center;">Years of Experience</td> <td style="text-align: center;">15</td> </tr> <tr> <td style="text-align: center;">Number of Offshore Wind port projects</td> <td style="text-align: center;">15</td> </tr> <tr> <td colspan="2"><b>III. Ongoing Consultancy Projects</b></td> </tr> <tr> <td style="text-align: center;"><b>Total</b></td> <td style="text-align: center;"><b>100</b></td> </tr> </tbody> </table> <p><i>Rating criteria for the firm:</i></p>	Criteria/ Particulars	Maximum number of points that could be awarded to a bid	<b>I. Firm Rating</b>		Years of experience in consultancy services	20	Number of similar completed consultancy contract for Offshore Wind Ports	20	Number of relevant completed consultancy contract for Maritime/ Ports Projects	10	<b>II. Nominated Key Experts Rating</b>		Education	10	Years of Experience	15	Number of Offshore Wind port projects	15	<b>III. Ongoing Consultancy Projects</b>		<b>Total</b>	<b>100</b>
Criteria/ Particulars	Maximum number of points that could be awarded to a bid																						
<b>I. Firm Rating</b>																							
Years of experience in consultancy services	20																						
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Education	10																						
Years of Experience	15																						
Number of Offshore Wind port projects	15																						
<b>III. Ongoing Consultancy Projects</b>																							
<b>Total</b>	<b>100</b>																						

**A. Years of Experience in Consultancy Services - 20 Points**

Criteria	Unit of Measure	Points			
		5	10	15	20
Years of Experience	Number of years	10 to <15	15 to <20	20 to <25	25 or more

**B. Number of similar completed projects (Consulting for Offshore Wind Ports) - 20 Points**

Criteria	Unit of Measure	Points	
		20	30
Similar completed consultancy contract for Offshore Wind Ports	Number of completed contracts	3 to 4	5 or more

**C. Number of relevant completed projects (Consulting for Maritime/ Ports Projects)- 10 Points**

Criteria	Unit of Measure	Points	
		5	10
Relevant completed consultancy contract for Maritime/ Ports Projects	Number of completed contracts	3 to 4	5 or more

***Rating criteria for the Nominated Key Experts:***

The nominated experts shall be rated in three areas: education, experience, and involvement with offshore wind port 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.

**A. Education - 10 Points**

Criteria	Unit of Measure	Points		
		5	7	10
Educational Attainment	Highest Level of Educational	BS	MS	PhD

	Attainment			
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Notes:

- *Nominated experts that do not have a degree in the field as specified in 5.2 shall be given 0 points. (Refer to page 34)*
- *Nominated experts with master's and/or doctorate degrees shall be rated according to the highest level they attained in the field as specified in 5.2. (Refer to page 34)*

*e.g., if a nominated expert has a doctorate, but only their Bachelor's and Master's are in the field as specified in 5.2, then their rating would be 5 or 7. (Refer to page 34)*

- *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 5.2, then they shall be rated according to the highest level they attained in the field as specified in 5.2. (Refer to page 34)*

*e.g., if a nominated expert has a bachelor's degree that is not compliant to what is specified in 5.2, but has a doctorate that is compliant, then their rating would be 10. (Refer to page 34)*

**B. Years of Experience - 15 Points**

Criteria	Unit of Measure	Points	
		10	15
Project Manager	Number of years of professional experience	15	more than 15
Offshore Wind Port Technical Expert		15	more than 15
Wind Strategy & Economic Expert		10	more than 10
Wind Port Financial Expert		10	more than 10

**C. Number of Wind port projects - 15 Points**

Criteria	Unit of Measure	Points	
		10	15
Project Manager	Number of involvement in a	3	more than 3

	Offshore Wind Port Technical Expert	completed Wind Port Projects	3	more than 3
	Wind Strategy & Economic Expert		3	more than 3
	Wind Port Financial Expert		3	more than 3
<p><b><i>Rating criteria for Ongoing Consultancy Projects:</i></b></p> <p>Points for ongoing consultancy projects will be allocated based on project load, with the consultant handling the fewest projects receiving 10 points, and the second fewest receiving 9 points, and so on.</p>				

## ***Section IV. Eligibility Submission Forms***

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ELIGIBILITY DOCUMENTS SUBMISSION FORM

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[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: \_\_\_\_\_

**FORMAT OF CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF**

Proposed Position						
<b>Personal Information</b>						
Name of Staff						
Address			Contact No.		Email Address	
Date of Birth		Citizenship		Civil Status		
<i>Project Experience (start from the current employment, add rows if necessary) Similar and Related to the Project</i>						
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		
<i>Relevant Training (start from the most recent, add rows if necessary)</i>						
Course Title	Inclusive Dates		Location	No. of Hours	Conducted / Sponsored by	
	From	To				
<i>Education (start from the most recent, add rows if necessary)</i>						
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

ANNEX "E"

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



**PHILIPPINE NATIONAL OIL COMPANY**  
Asset Management Department  
PNOC Building 6, Energy Compound, Rizal Drive, BGC, Taguig City

## **TERMS OF REFERENCE**

**Project:** *Preparatory Study and Conceptual Design for the Offshore Wind Integration Port (OSWIP)*

**Project Location:** Energy Supply Base, Mainaga, Mabini, Batangas

**Justification:** The transformation of the PNOE Energy Supply Base into an Offshore Wind Integration Port aligns with the global shift towards renewable energy and the growing demand for offshore wind farms. Conducting a detailed investor study and developing a robust business model will attract investors by providing a clear understanding of financial parameters, market potential, and project viability.

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### **I. INTRODUCTION**

The Philippine National Oil Company (PNOC) owns an existing Energy Supply Base (ESB) in its 19.2 hectare property located in Mabini, Batangas, which they plan to transform into an Offshore Wind Integration Port (OSWIP). Established in 1977, the Energy Supply Base has traditionally supported offshore and onshore exploration activities. The facility features four piers with depths ranging from 4 to 12 meters, an open storage area of 3.0 hectares, a 4.3-hectare area leased to Petron, a 4.4-hectare hilly area, and 7.5 hectares of other operational areas.

PNOC is contracting a third party to conduct preparatory study and conceptual design of the OSWIP to serve as an initial investor study to outline the project's opportunities and financial parameters, providing a comprehensive overview for prospective stakeholders. This transformation aims to support the growing offshore wind industry and position the facility as a key player in the renewable energy sector.

#### **PURPOSE OF THE ENGAGEMENT**

1. To prepare the set of documents that would be used as a basis for attraction of the potential investors for the development and operation of the offshore wind port.
2. To establish the parameters and develop a preliminary facility layout of a dedicated port for the construction and integration of offshore wind farms.

## II. SCOPE OF SERVICES

The principal tasks, duties and responsibilities of the Consultant are outlined below.

- a. **Commercial Potential.** To conduct a detailed review of the local Offshore Wind Market and Project Pipeline, and identify the potential market share this facility could capture within its geographic reach. This includes identifying potential port competitors and assessing the facility's competitive position relative to these competitors. The resulting market capture analysis will be translated into a port activity forecast, serving as an input for the Business Model Assessment (scope h).
- b. **Design Report and its Basis.** To establish port requirements considering Philippine setting as a Basis of Design report for an integration port to capture the market for the expected fixed bottom and floating foundation types. The Basis of Design report shall be responsive to the requirements of existing developers with awarded Offshore Wind Energy Service Contracts within the 120 nautical miles from the port.
- c. **Development options.** Conduct site visits to perform a visual inspection of the existing facilities, collect relevant site data, and prepare development options for the project.
- d. **Facility Layouts.** Prepare facility layouts which consider logistics flow of components, dimensions and location of areas for inbound quay, storage areas, assembly areas, as well as inbound quay requirements for:
  - i. Fixed bottom staging/construction facility
  - ii. Floating foundation assembly facility and wet storage
  - iii. Floating foundation marshalling and integration facility
  - iv. Other relevant facility setup based on the market capture.
- e. **Visualization.** Prepare 3D visualizations of the facility which includes:
  - i. A digital 3D model file that can be manipulated and viewed from different angles using software tools.
  - ii. A dynamic, animated video walkthrough of the facility.
  - iii. A physical, miniature version of the facility (Scale 1:500).
- f. **Cost Estimate.** Prepare cost estimate for Capital and Operational Costs.
- g. **E&S risks and Measures.** Perform environmental and social scan and identify main project risks and potential mitigation measures.
- h. **Business Model Assessment.** Identification of the revenue potential resulting from offshore wind activities for the facility. This needs to be based on the feasible port role in offshore wind for this facility, the Capital and Operational Cost estimated and the preferred operating model / governance structure. A basic business case performance and financial model study is required to determine the main project financial parameters like the Return of Investment (ROI) and Net Present Value (NPV) and any other indicators deemed relevant for the study.

The financial model needs to consider:

1. Three (3) forecast scenarios (low, base, high case);
2. The financial break-even point for this facility;
3. Benchmarked port tariff rates;
4. The potential funding gap for the facility; and
5. Others as maybe deemed necessary.

**i. Investor Memorandum Pack.** The Consultant shall prepare a comprehensive and concise Investor Memorandum Pack for the OSWIP project, limited to a maximum of 10 pages. This pack will summarize the key deliverables outlined in items a to h. Additionally, the Consultant will identify potential national and international investors for an investment roadshow. The Investor Memorandum Pack shall be professionally bound in a high-quality presentation folder, made of durable, eco-friendly materials. The pages will be printed on premium, 100gsm matte-finish paper to ensure clarity and durability. The Consultant shall submit 50 copies of the approved memorandum pack and provide an electronic, editable copy for further use and distribution.

### III. COMMENCEMENT DATE AND PERIOD OF IMPLEMENTATION

The commencement date of the engagement period shall be upon the issuance of Notice to Proceed (NTP). All required deliverables under the engagement contract as enumerated below shall be completed within a period of **ninety (90) calendar days** from the commencement date.

In case where completion of all deliverables cannot be achieved within the contract duration, contract extension may be allowed, provided, the cause of delay is not accountable to the Consultant and that it shall bear no additional cost to PNOC.

### IV. DELIVERABLES

The deliverables for the engagement, as enumerated in the table below, shall be submitted by the Project Consultant in both hard and electronic copies to PNOC.

<b>Deliverable Number</b>	<b>Deliverable</b>	<b>Timeline</b>
1	Inception Report	15 Calendar Days from NTP
2	Draft Study including: A. Executive Summary B. Commercial Potential C. Design Report and its Basis D. Development Options E. Facility Layouts F. Cost Estimates G. E&S Risk and Measures	60 Calendar Days from NTP



	H. Business Model Assessment I. Investor Memorandum Pack J. Comprehensive summaries of all coordination meetings held with key stakeholders to include, but are not limited to, offshore wind developers with existing Offshore Wind Energy Service Contracts (OSWESC), relevant government entities and any other parties with a significant interest in the project.	
3	Final Study including:  A. Executive Summary B. Commercial Potential C. Design Report and its Basis D. Development Options E. Facility Layouts F. Cost Estimates G. E&S Risk and Measures H. Appendices I. References	90 Calendar Days from NTP
4	3D Visualization  A. A digital 3D model file. B. Video walkthrough of the facility. C. 3D Scale Model of the Port (Scale 1:500)	90 Calendar Days from NTP
5	Investor Memorandum Pack  A. Cover Page B. Executive Summary C. Company Profile D. Project Description E. Market Analysis F. Financial Projections Overview G. Strategic Partnership and Collaborations H. 3D Visualization I. Contact Information and Call to Action J. Appendices	90 Calendar Days from NTP

The Consultant shall provide the necessary technical assistance/support during presentation of final studies and 3D Visualization to relevant units in PNOC and other regulatory agencies like DOE, as may be needed, for the final approval of the study.

## V. MINIMUM EXPERTISE REQUIREMENTS

### 5.1 Firm Qualification

1. With at least 10 years of consulting experience
2. With permanent presence in the Philippines

3. Must have completed studies of at least 3 port/maritime projects in the last 5 years within Philippines including at least 1 market and commercial assessment.

4. Must have completed studies of at least 3 wind port projects globally in the last 5 years (feasibility study, concept or detailed design)

### 5.2 Key Experts Qualification

Key Expert	Minimum Requirements
1. Project Manager	<ul style="list-style-type: none"> <li>● Civil Engineer</li> <li>● 15 years of professional experience in domestic or international port and maritime services.</li> </ul>
2. Offshore Wind Port Technical Expert	<ul style="list-style-type: none"> <li>● Civil Engineer</li> <li>● 15 years of professional experience in domestic or international port and maritime sector.</li> <li>● At least 3 wind port projects involvement for feasibility stage, concept or detailed design.</li> </ul>
3. Wind Strategy & Economic Expert	<ul style="list-style-type: none"> <li>● Economist</li> <li>● 10 years of professional experience in domestic or international port and maritime sector.</li> <li>● At least 3 wind port projects involvement for feasibility stage, concept or detailed design</li> </ul>
4. Wind Port Financial Expert	<ul style="list-style-type: none"> <li>● Economist or Financial Analyst</li> <li>● 10 years of professional experience in commercial due diligence and financial modelling in the port, maritime and/or offshore wind sector.</li> <li>● At least 3 wind port projects involvement for assessing commercial potential and the business model.</li> </ul>

The proponent shall define the project organization by specifying positions and tasks, providing detailed profiles and availability certifications for each expert. This includes listing the names of all experts, detailing their qualifications, experience, and relevant skills, and stating each expert's role in the project. Additionally, a schematic sheet should be provided to indicate the functions of each position, show hierarchical relationships, and ensure that no expert holds more than one position.

The experts' curriculum vitae have to be submitted along with the offer of the bidders which will form part of the bases in evaluating the offers. It should detail the educational background, work experiences (highlighting the requirements set in Section 6.2 of this TOR) and other qualifications of each of the Project team members. The prospective proponent-firms may be required to present proof to support their credentials as well as those of each of their members/experts, such as list of previous feasibility studies conducted and certificate of employment from previous employers.

Any misrepresentation made, orally or in writing, in any of the credentials and its supporting documents submitted, whether pertaining to the firm or to any of its members, shall be a ground for disqualification of the prospective bidder-firm.

## VI. EVALUATION OF BIDS

Bid evaluation shall start with a shortlisting of all bids, followed by an assessment of all shortlisted bids' technical and financial proposals. Prospective bidders shall submit the necessary technical, legal, and financial documents as stated in the Invitation to Apply for Eligibility and to Bid (IAEB) and the Instructions to Bidders (ITB) and other required documents as required by pertinent laws and regulations.

### 6.1 Shortlisting

A maximum of three qualifying bids with at least 55 points out of 100 shall be shortlisted in the shortlisting round. The breakdown is as follows:

Criteria/ Particulars	Maximum number of points that could be awarded to a bid
<b>I. Firm Rating</b>	<b>50</b>
Years of experience in consultancy services	20
Number of similar completed consultancy contract for Offshore Wind Ports	20
Number of relevant completed consultancy contract for Maritime/ Ports Projects	10
<b>II. Nominated Key Experts Rating</b>	<b>40</b>
Education	10
Years of Experience	15
Number of Wind port projects	15
<b>III. Ongoing Consultancy Projects</b>	<b>10</b>
<b>Total</b>	<b>100</b>

#### *Rating criteria for the firm:*

Firms that meet the minimum requirements as stated in 5.1 shall be rated based on the following:

#### **A. Years of Experience in Consultancy Services - 20 Points**

Criteria	Unit of Measure	Points
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		<b>5</b>	<b>10</b>	<b>15</b>	<b>20</b>
Years of Experience	Number of years	10 to <15	15 to <20	20 to <25	25 or more

**B. Number of similar completed projects (Consulting for Offshore Wind Ports) - 20 Points**

Criteria	Unit of Measure	Points	
		10	20
Similar completed consultancy contract for Offshore Wind Ports	Number of completed contracts	3 to 4	5 or more

**C. Number of relevant completed projects (Consulting for Maritime/ Ports Projects)- 10 Points**

Criteria	Unit of Measure	Points	
		5	10
Relevant completed consultancy contract for Maritime/ Ports Projects	Number of completed contracts	3 to 4	5 or more

***Rating criteria for the Nominated Key Experts:***

The nominated experts shall be rated in three areas: education, experience, and involvement with offshore wind port 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.

**A. Education - 10 Points**

Notes:

Criteria	Unit of Measure	Points		
		5	7	10
Educational Attainment	Highest Level of Educational Attainment	BS	MS	PhD

- *Nominated experts that do not have a degree in the field as specified in 5.2 shall be given 0 points.*

- *Nominated experts with master's and/or doctorate degrees shall be rated according to the highest level they attained in the field as specified in 5.2*

*e.g., if a nominated expert has a doctorate, but only their bachelor's and master's are in the field as specified in 5.2, then their rating would be 5 or 7*

- *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 5.2, then they shall be rated according to the highest level they attained in the field as specified in 5.2.*

*e.g., if a nominated expert has a bachelor's degree that is not compliant to what is specified in 5.2, but has a doctorate that is compliant, then their rating would be 10*

### **B. Years of Experience - 15 Points**

Criteria	Unit of Measure	Points	
		10	15
Project Manager	Number of years of professional experience	15	more than 15
Offshore Wind Port Technical Expert		15	more than 15
Wind Strategy& Economic Expert		10	more than 10
Wind Port Financial Expert		10	more than 10

### **C. Number of Wind port projects - 15 Points**

Criteria	Unit of Measure	Points	
		10	15
Project Manager	Number of involvement in a completed Wind Port Projects	3	more than 3
Offshore Wind Port Technical Expert		3	more than 3
Wind Strategy& Economic Expert		3	more than 3
Wind Port Financial Expert		3	more than 3

***Rating criteria for Ongoing Consultancy Projects:***

Points for ongoing consultancy projects will be allocated based on project load, with the consultant handling the fewest projects receiving 10 points, and the second fewest receiving 9 points, and so on.

**6.2 Proposal Evaluation**

The technical and financial proposals of the shortlisted bidders shall be evaluated using the Quality-Cost Based Evaluation according to pertinent provisions of RA 9184. The rating breakdown shall be as follows:

<b>Criteria/ Particulars</b>	<b>Maximum number of points that could be awarded to a bid</b>
<b>I. Technical Proposal</b>	<b>85</b>
Technical proposal ( <i>Approach and Methodology, Work Plan, Organization and Staffing</i> )	40
Consultant qualification ( <i>Firm and Experts' Qualification</i> )	45
<b>II. Financial Proposal</b>	<b>15</b>
<b>Total</b>	<b>100</b>

A rating of 0 points in any of the areas above means the automatic disqualification of the bid.

**Technical Proposal Evaluation – 85 points**

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

***Technical Proposal – 40 points***

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

**1. 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.

## 2. 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 item 1, 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.

## 3. 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	20	In addition to the description under 'good', the proposed technical approach and methodology present an efficient and effective way to address the work outlined in this Terms of Reference, an indication that the bidder understood the scope of work outlined in the assignment. The submission illustrates that the bidder has an excellent level of knowledge on the assignment and its surrounding conditions, and a firm grasp of solutions founded on state-of-the-art approaches and knowledge.
Good	15	The proposed technical approach and methodology is discussed in detail and is specifically tailored to the scope of work outlined in this Terms of Reference. The submission is flexible enough to allow it to adapt to changes that may occur during the course of the engagement.
Fair	10	Only a general discussion of the proposed technical approach and methodology was provided by the bidder. The submission, despite being adequate, does not specifically address the requirements as outlined in this Terms of Reference.

B. Work Plan		
Rating	Points	Description

Very Good	10	In addition to the description under 'good', the decision points, sequence, and timing of activities are well-defined, indicating that the bidder has optimized the use of resources.
Good	7	The work plan responds well to the requirements of the TOR and is sufficiently explained to facilitate an understanding of the proposed work plan.  All of the important activities are indicated in the activity schedule and the timing for the same is consistent with assignment outputs. The interrelation among the various activities is realistic and consistent with the proposed approach.
Fair	5	All key activities are included but are not explained in detail. Minor inconsistencies are present among the timing, assignment outputs, and the proposed approach.

C. Organization and Staffing		
Rating	Points	Description
Very Good	10	In addition to the description under 'Good', the proposed organization and staffing is integrated, clearly shows lines of responsibility, and contains a detailed discussion proving that the bidder has optimized the deployment of the identified experts based on the proposed logistics.
Good	7	The proposed organization and staffing schedule is complete and complemented with a detailed description of duties and responsibilities for each identified expert. Staffing is consistent with both timing and assignment outputs.
Poor	5	The proposed organization and staffing schedule, along with the description of duties and responsibilities for each identified expert, are adequate but could benefit from additional detail and clarity to fully meet the requirements of the TOR. While the bidder's organization and staffing arrangement shows potential, there are concerns about the ability to deliver the required outputs effectively within the prescribed period of the assignment.



**Consultant qualification – 45 points**

Criteria/ Particulars	Maximum number of points that could be awarded to a bid
<b>I. Firm Rating</b>	<b>22.5</b>
Years of experience in consultancy services	9
Number of similar completed consultancy contract for Offshore Wind Ports	9
Number of relevant completed consultancy contract for Maritime/ Ports Projects	4.5
<b>II. Nominated Key Experts Rating</b>	<b>18</b>
Education	4.5
Years of Experience	6.75
Number of Wind port projects	6.75
<b>III. Ongoing Consultancy Projects</b>	<b>4.5</b>
<b>Total</b>	<b>45</b>

**Rating criteria for the firm:**

Firms that meet the minimum requirements as stated in 5.1 shall be rated based on the following:

**A. Years of Experience in Consultancy Services - 9 Points**

Criteria	Unit of Measure	Points			
		3	5	7	9
Years of Experience	Number of years	10 to <15	15 to <20	20 to <25	25 or more

**B. Number of similar completed projects (Consulting for Offshore Wind Ports) - 9 Points**

Criteria	Unit of Measure	Points
----------	-----------------	--------

		<b>5</b>	<b>9</b>
Similar completed consultancy contract for Offshore Wind Ports	Number of completed contracts	3 to 4	5 or more

**C. Number of relevant completed projects (Consulting for Maritime/ Ports Projects)- 4.5 Points**

Criteria	Unit of Measure	Points	
		2	4.5
Relevant completed consultancy contract for Maritime/ Ports Projects	Number of completed contracts	3 to 4	5 or more

***Rating criteria for the Nominated Key Experts:***

The nominated experts shall be rated in three areas: education, experience, and involvement with offshore wind port 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.

**A. Education - 4.5 Points**

Notes:

Criteria	Unit of Measure	Points		
		2	3	4.5
Educational Attainment	Highest Level of Educational Attainment	BS	MS	PhD

- *Nominated experts that do not have a degree in the field as specified in 5.2 shall be given 0 points.*
- *Nominated experts with master's and/or doctorate degrees shall be rated according to the highest level they attained in the field as specified in 5.2*

*e.g., if a nominated expert has a doctorate, but only their bachelor's and master's are in the field as specified in 5.2, then their rating would be 5 or 7*

- *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 5.2, then they shall be rated according to the highest level they attained in the field as specified in 5.2.*

*e.g., if a nominated expert has a bachelor's degree that is not compliant to what is specified in 5.2, but has a doctorate that is compliant, then their rating would be 10*

**B. Years of Experience - 6.75 Points**

Criteria	Unit of Measure	Points	
		3.5	6.75
Project Manager	Number of years of professional experience	15	more than 15
Offshore Wind Port Technical Expert		15	more than 15
Wind Strategy & Economic Expert		10	more than 10
Wind Port Financial Expert		10	more than 10

**C. Number of Wind port projects - 6.75 Points**

Criteria	Unit of Measure	Points	
		3.5	6.75
Project Manager	Number of involvement in a completed Wind Port Projects	3	more than 3
Offshore Wind Port Technical Expert		3	more than 3
Wind Strategy & Economic Expert		3	more than 3
Wind Port Financial Expert		3	more than 3

***Rating criteria for Ongoing Consultancy Projects:***

Points for ongoing consultancy projects will be allocated based on project load, with the consultant handling the fewest projects receiving 4.5 points, and the second fewest receiving 4 points, and so on.

**Financial Proposal Evaluation – 15 points**

The Bidder/Bidders who quoted a Financial Bid equal to or less than the approved budget for the contract (ABC) shall get 15 points. Bidders who quoted a Financial Bid more than the ABC shall be rejected/disqualified.

All ABC-compliant bids shall be ranked, with the lowest bid ranking first and getting the full rating of 15. Rating for other bids (Bidder N) shall be determined using the following formula:

$$\frac{\text{Lowest Financial Bid}}{\text{Financial Bid of Bidder N}} \times 15$$

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.

**VII. OTHER EQUIPMENT AND FACILITIES**

The Consultant shall be responsible for providing its own supplies and other materials, equipment, transportation, telephone, and other communication facilities, that shall be required in the performance of the services described in these Terms of Reference.

**VIII. PAYMENT SCHEDULE**

Milestone payments will be adopted, as presented in the table below, where the payment shall be released upon approval of PNOC of the deliverables – ensuring that these conform to the requirements set for the purpose. Payments are to be made to the Project Consultant in milestone payments as outlined below:

Milestone	Percentage of Payment
Submission of Inception Report	5%
Submission of Draft Study	45%
Submission of Final Study, 3D Visualization, and Investor Memorandum Pack	25%
Acceptance of Final Study, 3D Visualization, and Investor Memorandum Pack	25%

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

## **IX. APPROVED BUDGET FOR THE CONTRACT**

PNOC has an approved corporate budget in the amount of **five million and two hundred fifty thousand pesos (PHP5,250,000.00)** for the engagement of a Consultant for the *Preparatory Study and Conceptual Design for the Offshore Wind Integration Port (OSWIP)*.

