

PHILIPPINE BIDDING DOCUMENTS

PROCUREMENT OF THE SERVICES OF A COMPANY THAT PROVIDES CUSTOMER RELATIONS MANAGEMENT SYSTEM

Government of the Republic of the
Philippines

**Sixth Edition
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Glossary of Acronyms, Terms, and Abbreviations

ABC – Approved Budget for the Contract.

BAC – Bids and Awards Committee.

Bid – A signed offer or proposal to undertake a contract submitted by a bidder in response to and in consonance with the requirements of the bidding documents. Also referred to as *Proposal* and *Tender*. (2016 revised IRR, Section 5[c])

Bidder – Refers to a contractor, manufacturer, supplier, distributor and/or consultant who submits a bid in response to the requirements of the Bidding Documents. (2016 revised IRR, Section 5[d])

Bidding Documents – The documents issued by the Procuring Entity as the bases for bids, furnishing all information necessary for a prospective bidder to prepare a bid for the Goods, Infrastructure Projects, and/or Consulting Services required by the Procuring Entity. (2016 revised IRR, Section 5[e])

BIR – Bureau of Internal Revenue.

BSP – Bangko Sentral ng Pilipinas.

Consulting Services – Refer to services for Infrastructure Projects and other types of projects or activities of the GOP requiring adequate external technical and professional expertise that are beyond the capability and/or capacity of the GOP to undertake such as, but not limited to: (i) advisory and review services; (ii) pre-investment or feasibility studies; (iii) design; (iv) construction supervision; (v) management and related services; and (vi) other technical services or special studies. (2016 revised IRR, Section 5[i])

CDA - Cooperative Development Authority.

Contract – Refers to the agreement entered into between the Procuring Entity and the Supplier or Manufacturer or Distributor or Service Provider for procurement of Goods and Services; Contractor for Procurement of Infrastructure Projects; or Consultant or Consulting Firm for Procurement of Consulting Services; as the case may be, as recorded in the Contract Form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.

CIF – Cost Insurance and Freight.

CIP – Carriage and Insurance Paid.

CPI – Consumer Price Index.

DDP – Refers to the quoted price of the Goods, which means “delivered duty paid.”

DTI – Department of Trade and Industry.

EXW – Ex works.

FCA – “Free Carrier” shipping point.

FOB – “Free on Board” shipping point.

Foreign-funded Procurement or Foreign-Assisted Project– Refers to procurement whose funding source is from a foreign government, foreign or international financing institution as specified in the Treaty or International or Executive Agreement. (2016 revised IRR, Section 5[b]).

Framework Agreement – Refers to a written agreement between a procuring entity and a supplier or service provider that identifies the terms and conditions, under which specific purchases, otherwise known as “Call-Offs,” are made for the duration of the agreement. It is in the nature of an option contract between the procuring entity and the bidder(s) granting the procuring entity the option to either place an order for any of the goods or services identified in the Framework Agreement List or not buy at all, within a minimum period of one (1) year to a maximum period of three (3) years. (GPPB Resolution No. 27-2019)

GFI – Government Financial Institution.

GOCC – Government-owned and/or –controlled corporation.

Goods – Refer to all items, supplies, materials and general support services, except Consulting Services and Infrastructure Projects, which may be needed in the transaction of public businesses or in the pursuit of any government undertaking, project or activity, whether in the nature of equipment, furniture, stationery, materials for construction, or personal property of any kind, including non-personal or contractual services such as the repair and maintenance of equipment and furniture, as well as trucking, hauling, janitorial, security, and related or analogous services, as well as procurement of materials and supplies provided by the Procuring Entity for such services. The term “related” or “analogous services” shall include, but is not limited to, lease or purchase of office space, media advertisements, health maintenance services, and other services essential to the operation of the Procuring Entity. (2016 revised IRR, Section 5[r])

GOP – Government of the Philippines.

GPPB – Government Procurement Policy Board.

INCOTERMS – International Commercial Terms.

Infrastructure Projects – Include the construction, improvement, rehabilitation, demolition, repair, restoration or maintenance of roads and bridges, railways, airports, seaports, communication facilities, civil works components of information technology projects, irrigation, flood control and drainage, water supply, sanitation, sewerage and solid waste management systems, shore protection, energy/power and electrification facilities, national buildings, school buildings, hospital buildings, and other related construction projects of the government. Also referred to as *civil works or works*. (2016 revised IRR, Section 5[u])

LGUs – Local Government Units.

NFCC – Net Financial Contracting Capacity.

NGA – National Government Agency.

PhilGEPS - Philippine Government Electronic Procurement System.

Procurement Project – refers to a specific or identified procurement covering goods, infrastructure project or consulting services. A Procurement Project shall be described,

detailed, and scheduled in the Project Procurement Management Plan prepared by the agency which shall be consolidated in the procuring entity's Annual Procurement Plan. (GPPB Circular No. 06-2019 dated 17 July 2019)

PSA – Philippine Statistics Authority.

SEC – Securities and Exchange Commission.

SLCC – Single Largest Completed Contract.

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

UN – United Nations.

Section I. Invitation to Bid

INVITATION TO BID FOR PROCUREMENT OF THE SERVICES OF A COMPANY THAT PROVIDES CUSTOMER RELATIONS MANAGEMENT SYSTEM

1. The **Center for International Trade Expositions and Missions**, through the following budget sources: IFEX Philippines NXT FOOD ASIA (Php1,830,000), Manila FAME October (Php 600,000), Create Philippines (Php 3,000,000), SSX (1,770,000) and Institutional Promotions Corporate Communications (Php 1,100,000), intends to apply the sum of **Eight Million Three Hundred Thousand Pesos (Php 8,300,000.00) being the ABC** to payments under the contract for *Procurement of the services of a Company that provides Customer Relations Management system*. Bids received in excess of the ABC shall be automatically rejected at bid opening.
2. The **Center for International Trade Expositions and Missions** now invites bids for the above Procurement Project. Delivery of the Goods is required by *on or before November 2, 2021*. Bidders should have completed, within *three (3) years* from the date of submission and receipt of bids, a contract similar to the Project. The description of an eligible bidder is contained in the Bidding Documents, particularly, in Section II (Instructions to Bidders).
3. Bidding will be conducted through open competitive bidding procedures using a non-discretionary “*pass/fail*” criterion as specified in the 2016 revised Implementing Rules and Regulations (IRR) of Republic Act (RA) No. 9184.

Bidding is restricted to Filipino citizens/sole proprietorships, partnerships, or organizations with at least sixty percent (60%) interest or outstanding capital stock belonging to citizens of the Philippines, and to citizens or organizations of a country the laws or regulations of which grant similar rights or privileges to Filipino citizens, pursuant to RA No. 5183.

4. Prospective Bidders may obtain further information from *Center for International Trade Expositions and Missions* and inspect the Bidding Documents at the address given below during **Mondays to Fridays, 8:00AM - 5:00PM**.
5. A complete set of Bidding Documents may be acquired by interested Bidders on **04 October 2021** from the given address and website(s) below *upon payment of the applicable fee for the Bidding Documents, pursuant to the latest Guidelines issued by the GPPB, in the amount of Five Thousand Pesos (Php 5,000.00)*. The Procuring Entity shall allow the bidder to present its proof of payment for the fees *through electronic means*. *Payment shall be made thru CITEM Bank Account below, a copy of bank deposit slip should be emailed to the BAC Secretariat:*
 - o Bank : Landbank of the Philippines
 - o Account Name : CITEM
 - o Account Number : 1772 1038 63
 - o Bank Address : LBP Century Park (Harrison Plaza) Branch
 - o Swift Code : TLBPPHMM

6. The *Center for International Trade Expositions and Missions* will hold a Pre-Bid Conference on **12 October 2021, 2:00PM** which shall be open to prospective bidders. Please contact the CITEM Bids and Awards Committee Secretariat through email at citembac@citem.com.ph for

the link of the Video Conference meeting. The link will be released on the actual day of the Pre-Bid Conference

7. Bids must be duly received by the BAC Secretariat through manual submission at the office address indicated below on or before **26 October 2021, 2:00PM. Late bids shall not be accepted.**
8. All Bids must be accompanied by a bid security in any of the acceptable forms and in the amount stated in **ITB** Clause 14.
9. Bid opening shall be on **26 October 2021, 2:00PM**. Bids will be opened in the presence of the bidders' representatives who choose to attend the activity. Please contact the CITEM Bids and Awards Committee Secretariat through email at citembac@citem.com.ph for the link of the Video Conference meeting. The link will be released on the actual day of the Opening of Bids.
10. The *Center for International Trade Expositions and Missions* reserves the right to reject any and all bids, declare a failure of bidding, or not award the contract at any time prior to contract award in accordance with Sections 35.6 and 41 of the 2016 revised IRR of RA No. 9184, without thereby incurring any liability to the affected bidder or bidders.
11. For further information, please refer to:

CITEM-BAC Secretariat

Center for International Trade Expositions and Missions
Golden Shell Pavilion
Roxas Blvd. Cor. Sen. Gil Puyat Ave., Pasay City
Tel no. +63(2) 8-831-2201 loc. 294/309
Email: citembac@citem.com.ph
Website: www.citem.com.ph

12. You may visit the following websites:

For downloading of Bidding Documents: <https://citem.gov.ph/procurement/invitation-to-bid>

04 October 2021



ATTY. ANNA GRACE I. MARPURI
Chairman, CITEM-Bids and Awards Committee

Section II. Instructions to Bidders

1. Scope of Bid

The Procuring Entity, *Center for International Trade Expositions and Missions* wishes to receive Bids for the *Procurement of the services of a Company that provides Customer Relations Management System* with identification number **CITEM 2021-0100**.

The Procurement Project (referred to herein as "Project") is composed of *one lot*, the details of which are described in Section VII (Technical Specifications).

2. Funding Information

2.1. The GOP through the source of funding as indicated below for year 2021 in the amount of **Eight Million Three Hundred Thousand Pesos (Php8,300,000.00)**.

2.2. The source of funding is GOCC, the Corporate Operating Budget.

3. Bidding Requirements

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

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

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

4. Corrupt, Fraudulent, Collusive, and Coercive Practices

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

5. Eligible Bidders

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

5.2. Foreign ownership limited to those allowed under the rules may participate in this Project.

- 5.3. Pursuant to Section 23.4.1.3 of the 2016 revised IRR of RA No.9184, the Bidder shall have an SLCC that is at least one (1) contract similar to the Project the value of which, adjusted to current prices using the PSA's CPI, must be at least equivalent to:
 - a. For the procurement of Non-expendable Supplies and Services: The Bidder must have completed a single contract that is similar to this Project, equivalent to at least fifty percent (50%) of the ABC.
- 5.4. The Bidders shall comply with the eligibility criteria under Section 23.4.1 of the 2016 IRR of RA No. 9184.

6. Origin of Goods

There is no restriction on the origin of goods other than those prohibited by a decision of the UN Security Council taken under Chapter VII of the Charter of the UN, subject to Domestic Preference requirements under **ITB** Clause 18.

7. Subcontracts

- 7.1. The Bidder may subcontract portions of the Project to the extent allowed by the Procuring Entity as stated herein, but in no case more than twenty percent (20%) of the Project.

The Procuring Entity has prescribed that Subcontracting is allowed. The portions of Project and the maximum percentage allowed to be subcontracted are indicated in the **BDS**, which shall not exceed twenty percent (20%) of the contracted Goods.

- 7.2. The Bidder must submit together with its Bid the documentary requirements of the subcontractor(s) complying with the eligibility criteria stated in **ITB** Clause 5 in accordance with Section 23.4 of the 2016 revised IRR of RA No. 9184 pursuant to Section 23.1 thereof.
- 7.3. The Supplier may identify its subcontractor during the contract implementation stage. Subcontractors identified during the bidding may be changed during the implementation of this Contract. Subcontractors must submit the documentary requirements under Section 23.1 of the 2016 revised IRR of RA No. 9184 and comply with the eligibility criteria specified in **ITB** Clause 5 to the implementing or end-user unit.
- 7.4. Subcontracting of any portion of the Project does not relieve the Supplier of any liability or obligation under the Contract. The Supplier will be responsible for the acts, defaults, and negligence of any subcontractor, its agents, servants, or workmen as fully as if these were the Supplier's own acts, defaults, or negligence, or those of its agents, servants, or workmen.

8. Pre-Bid Conference

The Procuring Entity will hold a pre-bid conference for this Project on the specified date and time *via Microsoft Teams or Zoom* as indicated in paragraph 6 of the **IB**.

9. Clarification and Amendment of Bidding Documents

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

10. Documents comprising the Bid: Eligibility and Technical Components

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

11. Documents comprising the Bid: Financial Component

- 11.1. The second bid envelope shall contain the financial documents for the Bid as specified in **Section VIII (Checklist of Technical and Financial Documents)**.
- 11.2. If the Bidder claims preference as a Domestic Bidder or Domestic Entity, a certification issued by DTI shall be provided by the Bidder in accordance with Section 43.1.3 of the 2016 revised IRR of RA No. 9184.
- 11.3. Any bid exceeding the ABC indicated in paragraph 1 of the **IB** shall not be accepted.
- 11.4. For Foreign-funded Procurement, a ceiling may be applied to bid prices provided the conditions are met under Section 31.2 of the 2016 revised IRR of RA No. 9184.

12. Bid Prices

- 12.1. Prices indicated on the Price Schedule shall be entered separately in the following manner:
 - a. For Goods offered from within the Procuring Entity's country:
 - i. The price of the Goods quoted EXW (ex-works, ex-factory, ex-warehouse, ex-showroom, or off-the-shelf, as applicable);
 - ii. The cost of all customs duties and sales and other taxes already paid or payable;

- iii. The cost of transportation, insurance, and other costs incidental to delivery of the Goods to their final destination; and
 - iv. The price of other (incidental) services, if any, listed in the **BDS**.
- b. For Goods offered from abroad:
- i. Unless otherwise stated in the **BDS**, the price of the Goods shall be quoted delivered duty paid (DDP) with the place of destination in the Philippines as specified in the **BDS**. In quoting the price, the Bidder shall be free to use transportation through carriers registered in any eligible country. Similarly, the Bidder may obtain insurance services from any eligible source country.
 - ii. The price of other (incidental) services, if any, as listed in the **BDS**.

13. Bid and Payment Currencies

- 13.1. For Goods that the Bidder will supply from outside the Philippines, the bid prices may be quoted in the local currency or tradeable currency accepted by the BSP at the discretion of the Bidder. However, for purposes of bid evaluation, Bids denominated in foreign currencies, shall be converted to Philippine currency based on the exchange rate as published in the BSP reference rate bulletin on the day of the bid opening.
- 13.2. Payment of the contract price shall be made in Philippine Pesos.

14. Bid Security

- 14.1. The Bidder shall submit a Bid Securing Declaration¹ or any form of Bid Security in the amount indicated in the **BDS**, which shall be not less than the percentage of the ABC in accordance with the schedule in the **BDS**.
- 14.2. The Bid and bid security shall be valid until valid until **120 calendar days upon opening of bids**. Any Bid not accompanied by an acceptable bid security shall be rejected by the Procuring Entity as non-responsive.

15. Sealing and Marking of Bids

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

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

If the Procuring Entity allows the submission of bids through online submission or any other electronic means, the Bidder shall submit an electronic copy of its Bid, which must be digitally signed. An electronic copy that cannot be opened or is corrupted shall be considered non-responsive and, thus, automatically disqualified.

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

16. Deadline for Submission of Bids

- 16.1. The Bidders shall submit on the specified date and time and either at its physical address or through online submission as indicated in paragraph 7 of the **IB**.

17. Opening and Preliminary Examination of Bids

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

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

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

18. Domestic Preference

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

19. Detailed Evaluation and Comparison of Bids

- 19.1. The Procuring Entity's BAC shall immediately conduct a detailed evaluation of all Bids rated "*passed*," using non-discretionary pass/fail criteria. The BAC shall consider the conditions in the evaluation of Bids under Section 32.2 of the 2016 revised IRR of RA No. 9184.

- 19.2. If the Project allows partial bids, bidders may submit a proposal on any of the lots or items, and evaluation will be undertaken on a per lot or item basis, as the case maybe. In this case, the Bid Security as required by **ITB** Clause 14 shall be submitted for each lot or item separately.

- 19.3. The descriptions of the lots or items shall be indicated in **Section VII (Technical Specifications)**, although the ABCs of these lots or items are indicated in the **BDS** for purposes of the NFCC computation pursuant to Section 23.4.2.6 of the 2016 revised IRR of RA No. 9184. The NFCC must be sufficient for the total of the ABCs for all the lots or items participated in by the prospective Bidder.

- 19.4. The Project shall be awarded as follows:

One Project having several items that shall be awarded as one contract.

- 19.5. Except for bidders submitting a committed Line of Credit from a Universal or Commercial Bank in lieu of its NFCC computation, all Bids must include the NFCC computation pursuant to Section 23.4.1.4 of the 2016 revised IRR of RA No. 9184, which must be sufficient for the total of the ABCs for all the lots or items participated in by the prospective Bidder. For bidders submitting the

committed Line of Credit, it must be at least equal to ten percent (10%) of the ABCs for all the lots or items participated in by the prospective Bidder.

20. Post-Qualification

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

21. Signing of the Contract

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

Section III. Bid Data Sheet

ITB Clause	
5.3	For this purpose, contracts similar to the Project shall be: <ul style="list-style-type: none"> a. Procurement of the services of a Company that provides Customer Relations Management System b. completed within <i>three years</i> prior to the deadline for the submission and receipt of bids.
12	The price of the Goods shall be quoted DDP <i>Center for International Trade Expositions and Mission, Golden Shell Pavilion, Roxas Boulevard cor. 1300 Sen. Gil J. Puyat Ave, Pasay, 1300 Metro Manila</i> or the applicable International Commercial Terms (INCOTERMS) for this Project.
14.1	The bid security shall be in the form of a Bid Securing Declaration, or any of the following forms and amounts: <ul style="list-style-type: none"> a. The amount of not less than Php 166,000.00, if bid security is in cash, cashier's/manager's check, bank draft/guarantee or irrevocable letter of credit; or b. The amount of not less than Php 415,000.00, if bid security is in Surety Bond.
19.3	<i>Item is being bid out as Single Lot</i>
20.2	<i>No further instructions</i>
21.2	<i>No further instructions</i>

Section IV. General Conditions of Contract

1. Scope of Contract

This Contract shall include all such items, although not specifically mentioned, that can be reasonably inferred as being required for its completion as if such items were expressly mentioned herein. All the provisions of RA No. 9184 and its 2016 revised IRR, including the Generic Procurement Manual, and associated issuances, constitute the primary source for the terms and conditions of the Contract, and thus, applicable in contract implementation. Herein clauses shall serve as the secondary source for the terms and conditions of the Contract.

This is without prejudice to Sections 74.1 and 74.2 of the 2016 revised IRR of RA No. 9184 allowing the GPPB to amend the IRR, which shall be applied to all procurement activities, the advertisement, posting, or invitation of which were issued after the effectivity of the said amendment.

Additional requirements for the completion of this Contract shall be provided in the **Special Conditions of Contract (SCC)**.

2. Advance Payment and Terms of Payment

2.1. Advance payment of the contract amount is provided under Annex "D" of the revised 2016 IRR of RA No. 9184.

2.2. The Procuring Entity is allowed to determine the terms of payment on the partial or staggered delivery of the Goods procured, provided such partial payment shall correspond to the value of the goods delivered and accepted in accordance with prevailing accounting and auditing rules and regulations. The terms of payment are indicated in the **SCC**.

3. Performance Security

Within ten (10) calendar days from receipt of the Notice of Award by the Bidder from the Procuring Entity but in no case later than the signing of the Contract by both parties, the successful Bidder shall furnish the performance security in any of the forms prescribed in Section 39 of the 2016 revised IRR of RA No. 9184.

4. Inspection and Tests

The Procuring Entity or its representative shall have the right to inspect and/or to test the Goods to confirm their conformity to the Project specifications at no extra cost to the Procuring Entity in accordance with the Generic Procurement Manual. In addition to tests in the **SCC, Section VII (Technical Specifications)** shall specify what inspections and/or tests the Procuring Entity requires, and where they are to be conducted. The Procuring Entity shall notify the Supplier in writing, in a timely manner, of the identity of any representatives retained for these purposes.

All reasonable facilities and assistance for the inspection and testing of Goods, including access to drawings and production data, shall be provided by the Supplier to the authorized inspectors at no charge to the Procuring Entity.

5. Warranty

- 5.1 In order to assure that manufacturing defects shall be corrected by the Supplier, a warranty shall be required from the Supplier as provided under Section 62.1 of the 2016 revised IRR of RA No. 9184.
- 5.2 The Procuring Entity shall promptly notify the Supplier in writing of any claims arising under this warranty. Upon receipt of such notice, the Supplier shall, repair or replace the defective Goods or parts thereof without cost to the Procuring Entity, pursuant to the Generic Procurement Manual.

6. Liability of the Supplier

The Supplier's liability under this Contract shall be as provided by the laws of the Republic of the Philippines.

If the Supplier is a joint venture, all partners to the joint venture shall be jointly and severally liable to the Procuring Entity.

Section V. Special Conditions of Contract

GCC Clause							
1	<p>Delivery and Documents –</p> <p>For purposes of the Contract, “EXW,” “FOB,” “FCA,” “CIF,” “CIP,” “DDP” and other trade terms used to describe the obligations of the parties shall have the meanings assigned to them by the current edition of INCOTERMS published by the International Chamber of Commerce, Paris. The Delivery terms of this Contract shall be as follows: “The delivery terms applicable to this Contract are delivered to the <i>Center for International Trade Expositions which is located at Golden Shell Pavilion, Roxas Boulevard cor. Sen. Gil Puyat Avenue, Pasay City, Philippines</i>. Risk and title will pass from the Supplier to the Procuring Entity upon receipt and final acceptance of the Goods at their final destination.” Delivery of the Goods shall be made by the Supplier in accordance with the terms specified in Section VI (Schedule of Requirements).</p> <p>For purposes of this Clause the Procuring Entity’s Representative at the Project Site is Timothy P. Alcantara, Information Officer III.</p> <p>The Contract price for the Goods shall include the prices charged by the Supplier for incidental services and shall not exceed the prevailing rates charged to other parties by the Supplier for similar services.</p> <p>Transportation</p> <p>Where the Supplier is required to conduct on-site training at the office of the Center for International Trade Expositions and Missions in Golden Shell Pavilion cor. Sen. Gil Puyat Ave., Pasay City, Philippines, shall be arranged by the Supplier, and related costs shall be included in the Contract Price.</p> <p>Intellectual Property Rights –</p> <p>The Supplier shall indemnify the Procuring Entity against all third-party claims of infringement of patent, trademark, or industrial design rights arising from use of the Goods or any part thereof.</p> <p>Failure to Meet the Target Requirements</p> <p>Should the Supplier unable to deliver a Customer Relations Management System available with one-year subscription to Marketing Automation System and Social Media Marketing Tool, Implementation Services, and Application Management Support Services they are assigned to due to unforeseen circumstances or force majeure, and other factors beyond their control, they shall inform CITEM through its assigned project coordinator, and shall discuss alternate deliverables, if necessary. Below are the alternative deliverables that may be suggested or negotiated with the Supplier should there be any unforeseen circumstances that arise that hinder the successful delivery of the project/s:</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width: 33%;">Conditions</th> <th style="width: 33%;">Actions</th> <th style="width: 33%;">Remarks</th> </tr> </thead> <tbody> <tr> <td>One-year subscription to Marketing Automation System and Social Media Marketing Tool</td> <td>Cancelled contract</td> <td>Supplier must be the owner or has the appropriate proprietary licensing rights to a Customer Relations Management System equipped with a Marketing Automation System and Social Media Marketing tool.</td> </tr> </tbody> </table>	Conditions	Actions	Remarks	One-year subscription to Marketing Automation System and Social Media Marketing Tool	Cancelled contract	Supplier must be the owner or has the appropriate proprietary licensing rights to a Customer Relations Management System equipped with a Marketing Automation System and Social Media Marketing tool.
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2.2	<p>The payment terms should be as follows:</p> <p>FULL PAYMENT</p> <p>Turnover of Licenses through Signed Agreement Winning Bidder to issue invoice for Social Media Marketing and Marketing Automation System licenses.</p> <p>Total Amount: 100%</p>
4	<p>The inspections and tests that will be conducted are: Inventory of the licenses turned over to CITEM for the Marketing Automation System and Social Media Marketing Tool, agreed upon beta testing(s) date(s) before Going Live.</p>

Section VI. Schedule of Requirements

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

Item No.	Item	Specifications	Total	Delivered, Weeks / Months
1	One year subscription to Marketing Automation System	Messaging capability of more than 20 million/year Can accommodate more than 90,000 contacts More than 40 marketing automation users (Roles as administrators, viewer, channel manager, security administrator, content editor/publisher) 1,000 social media users (Roles as administrators, Super User, Full User, Basic User)	1 License	November 2021 to November 2022
2	One year subscription to Social Media Marketing Tool	Can accommodate 18 social media accounts Can accommodate 100 Topic Profiles within a single Tenant Can accommodate 250,000 social media mentions monthly	1 License	November 2021 to November 2022

I hereby commit to comply and deliver all the above requirement in accordance with the above stated schedule.

Name of Company/Bidder
 Date

(Signature Over Printed Name)
Bidder/Authorized Representative

Section VII. Technical Specifications

MANDATE

The Center for International Trade Expositions and Missions (CITEM), created under the E.O. 989 series of 1984, is the export promotion arm of the Philippine Department of Trade and Industry (DTI).

CITEM is committed to developing, nurturing, and promoting globally-competitive small and medium enterprises (SMEs), exporters, and manufacturers in the food and sustainability solutions sector by implementing an integrated approach to export marketing in partnership with other government and private entities. With such commitment, the agency organizes its signature events, Manila FAME and IFEX Philippines NXT FOOD Asia to better service its stakeholders.

Manila FAME supports local small- and medium-scale enterprises and artisan communities by working with local designers to create new product collections and providing a professionally managed platform to present export products to the global market.

IFEX Philippines NXT FOOD Asia is CITEM's banner food event for Asian and Philippine food champions to showcase a wide and diversified array of food and ingredients uniquely Asian and a one-stop business to business (B2B) platform for leading buyers and top grocers around the world aiming to optimize their sourcing experience.

GLOBAL SITUATIONER

The expos and trade show industry continues to perform strongly in 2018, with 99% of exhibitors finding unique value on attending trade shows compared to opportunities being offered by other marketing platforms.¹

For exhibitors, a majority find trade shows and expos beneficial to promote their companies and brands, obtain new buyers and prospects, and connect with existing clients.

For buyers, trade shows and expos provide opportunities on new products and services. Decision makers, particularly, are able to find at least one supplier on the show they attended, filling a gap in the supply chain cycle that is important in any business sector.

Above reasons focus on **relationship management and engagement**.

Admittedly, there are also disadvantages in a physical setting of trade shows and expos: 1) the cost of buyer attendance (45%), 2) limitation on providing the right spot on conference floor (45%), 3) low value in business leads (36%); 4) wrong speaking slots (36%); and 5) company booths being dominated by bigger players.²

LOCAL SITUATIONER

Fluctuating Buyer Attendance

For the last three years, fluctuations in buyer attendance are noted in both Manila FAME and IFEX Philippines NXT FOOD Asia as collated from Corporate Planning Division:

Manila FAME October

Indicators	2017	2018	2019	2020**
No. of Participants	435	364	385	532
No. of Trade Inquiries*	7,784	6,847	7,302	14,117 (in terms of website visits)

Trade Buyers	1,597	2,184	2,187	14,117 (in terms of website visits)
Potential Export Orders (in Million USD)	6.86	4.81	4.25	No data available
Local Sales (Domestic + Retail in Million Php)	62.00	73.46	30	No data available

*All registered attendees were considered to have made an inquiry

**A digital edition due to the COVID-19 global pandemic.

From 2017-2019, there were a total of 5,968 buyers who attended Manila FAME. On a yearly basis comparison, this resulted in a 36.75% buyer attendance increase in 2018 versus 2017. However, buyer attendance only registered a .13% growth in 2019 compared to 2018.

IFEX PH: NXTFOOD ASIA

Indicators	2017	2018	2019
No. of Participants	797	451	627
No. of Trade Inquiries	10,912	7,060	9,771
Trade Buyers	2,092	1,832	1,379
Potential Export Orders (in Million USD)	184.69	86.67	119.14
Local Sales (Domestic + Retail in Million Php)	424.68	59.78	456

*With ASEAN participation

**IFEX SEAFOOD

***All registered attendees were considered to have made an inquiry

****IFEX PH on 2020 was cancelled

For IFEX, buyer attendance reached a total of 5,303 from 2017-2019. Buyer attendance fell by 12.42% in 2018 from 2017, while it dropped further to 24.71% in 2019 versus 2018. With the fluctuations in the number of trade buyers in both banner shows, it was incumbent for CITEM to explore avenues to convince more buyers to attend its signature avenues. Thus, the development of the Digital Community Trade Platform (DTCP) for Manila FAME is timely and paramount as it helps exporters continue their conversation with buyers beyond a specific number of days usual in a physical trade fair.

Tapping the potential of online platforms

On 2020, CITEM augmented its physical trade shows with launch of Manila FAME Digital Community Platform, FAME Plus, in October 2020. FAME+ serves as a promotion and lead generation platform for the home, fashion and lifestyle (HFL) industry, which offers the following features:

- Database of brands and companies with their own digital storefronts to display their products
- Content Amelioration Program for the onboarded MSMEs
- Product Development Program
- Online magazine that tells the stories of the brands and products. These stories are then distributed via email and social media
- Exhibitor dashboard to manage leads
- Buyer dashboard enables them to collate info from the site
- Analytics
- CRM to aid marketing

A total of 14,117 users visited www.fameplus.com since its launched in 13 October 2020 until 31 December 2020, resulting in 22,565 sessions or user interactions and 113,289 page views. Also as of December, FAME+ already onboarded 184 exhibitors, promoting 479 new designs developed to 532 trade buyers, and has attracted 14,117 visitors.

COVID-19 Pandemic and Digitalization as the Way Forward

According to the Organization for Economic Co-operation and Development (OECD), **in the current the time of COVID-19 global pandemic, online platforms have opened new sales and sourcing channels for SMEs** and facilitated their access to multiple types of digital networks which might be key for the survival and expansion of both existing and nascent SMEs – by providing e-commerce sales, teleworking capabilities and more.

However, SMEs face challenges and risks in operating on online platforms. The lack of digital skills and the need to adapt business models can be important barriers. Fee structures of the platforms and the sharing of sensitive business data with implicit acceptance of matching algorithms on which SMEs have no influence or even information also present challenges. There are also risks related to digital security, competition distortion and possible lock-in effects.

Governments have a strong role to play in enabling greater uptake (and in turn fostering resilient growth). Initiatives are needed to boost SME engagement in e-commerce, greater online presence, and communication platforms that can facilitate remote working. Some governments are also promoting programmes in co-operation with large online platforms.

CITEM is a step ahead in mitigating huge economic costs in the absence of a physical event and the safety risks of face-to-face interaction brought on by the COVID-19 situation. FAME Plus DTCP is the first step to filling the void left by the cancellation of physical trade shows and expos. CITEM is also expanding the digitalization of its promotion efforts for various industries---for the creative industry (<https://www.createphilippines.com/>), food industry (<https://www.ifexconnect.com/> and [foodphilippines.com](https://www.foodphilippines.com)), and sustainability industry (<https://sustainabilityexpo.ph/>).

Importance of Relationship Management and Engagement

The 24/7, 360 days activities anticipated in a DTCP are expected to change how CITEM Project Teams interact with both buyers and exhibitors and vice versa. Such continuing conversation requires the deployment of an enterprise level Customer Relations Management (CRM) system that facilitate the journey of important stakeholders: the exhibitors, the Manila FAME Exhibitor Team, the buyers, and the Manila FAME Buyer Team

A. Improved Stakeholder Journey

From the point of view of internal teams of CITEM, it is a must to understand the exhibitor journey and buyer journey in a platform such as the Manila FAME DTCP.

Tracking and measuring the activities of exhibitors and buyers through a CRM would prove beneficial to Project Teams as behaviors of both groups provide a goldmine on how:

1. To calibrate its marketing initiatives to reach targeted buyers who have a need for products being featured at Manila FAME. This would decrease turnaround time in engaging buyers;
2. To improve customer relations with both exhibitor and buyers, thereby, increasing retention rates for both stakeholders;
3. To enhance efficiency level of internal CITEM employees who have roles and/or assigned tasks;
4. To re-configure frequently asked questions on a project for stakeholders;
5. To determine future builds within the CRM to better serve stakeholders; and
6. To generate real-time reports which will serve as customer feedback and help and the Agency achieve Item #1. And
7. To cascade customer feedback (i.e. buyers and other external stakeholders) to exhibitors to help the latter in their business decision making.

A. Cost Implication Benefits and Streamlined Service Delivery

The traditional process of running a complete cycle of engaging an exhibitor and a buyer is very costly for a government agency like CITEM.

Constant engagement between internal and outside stakeholders would require a considerable amount of man hours, which would translate into millions of pesos. For instance, producing a simple material like an e-card and then deploying it to various stakeholders included in a CITEM database would require the following process and actors/players/employees:

1. Operations Group (OG) – Fills up Service Request Form (SRF) for e-card
2. Division Clerk OG – Forwards the SRF
3. Division Clerk Web Marketing division – Receives the SRF and forwards to Division Chief
4. Division Chief (OIC, WMD + Communications Management Division) – Evaluates and forwards the SRF to Writer
5. CMD Writer – Conceptualized content, updates the SRF, sends back to DC OIC, WMD and CMD
6. DC OIC, WMD and CMD sends to DC WMD
7. DC WMD sends to Division Clerk Visual Design Division (VDD)
8. DC VDD received the SRF and sends to Point Person VDD
9. Point Person VDD assigns to VDD staff
10. VDD staff creates corresponding image or artworks
11. VDD staff sends to VDD Clerk
12. VDD Clerk sends to Division Clerk WMD
13. Division Clerk WMD sends to DC OIC, WMD and CMD
14. DC OIC, WMD and CMD assigns to WMD Developer for testing
15. WMD Developer tests e-card to internal stakeholders
16. OG as requesting party gives approval
17. WMD Division Clerk forwards to System, Maintenance and Management Division (SMDD) for send out

The process above is very labor intensive and is costing CITEM in thousands of pesos for one simple e-card. Since there are two signature events and other projects, it is not surprising for Project Officers to request a minimum of eight (8) e-cards for one project.

In a given month, the man hours being spent on several e-cards for one project, for example, would run in hundreds of thousands of pesos to a million. Compared to the Php300,000.00 per month that a powerful CRM can offer. This would mean more efficient use of the time of the staff involved in the actual process, which would eventually translate into millions of savings for CITEM.

The enumerated 17 steps described above can be reduced through the CRM. How?

Within the CRM, roles are assigned and/or delegated. The 17 steps can be cut down into:

1. Operations Group is assigned a role as an Account Manager, who will make a request for an e-card using a queuing system under the Administrator or DTCP Project Owner (the WMD and/or the Consultant under the Office of the Executive Director)
2. Administrator or DTCP Project Owner will then move the queue of the task to the Graphic Artist (VDD) and Writer to come up with the image and text for an ecard;
3. The Administrator or DTCP Project Owner approves the material and moves the queue to the Web Developer of WMD for coding adjustments (if necessary) and testing;
4. Once the test is approved by the Administrator or DTCP Project Owner, Web Developer requests SMDD staff for actual blast to database recipients;
5. The Administrator or DTCP Project Owner or SMDD staff generates the report for sharing to the requested Operation Group parties.

Overall, the procurement of an agile, easy-to use CRM that can integrate the current databases future proofs the agency from any internal or external factors that may greatly impact its operations and stakeholders at the same time provides huge savings in millions of pesos and provides opportunities for the agency to generate new income after deployment (since the features available such as the marketing automation system can be offered outside of CITEM).

OBJECTIVES

To hire a Philippine registered company that would provide a Customer Relations Managementsystem with the following qualifications:

1. The Philippine registered company must be an expert in providing a cloud- based solution on customer relationship management service and complementary enterprise application suites, with focused points on: marketing automation, customer service, application development, and analytics.

To submit: Company profile and services; and Organizational chart and outline of responsibilities including hierarchy and authorization (sign off authority points)

2. Must have 100 or more successful CRM project implementations.

To submit: List of projects implemented with any of the following: Signed Order Form, User Acceptance Testing, Go Live Certificate; Outline of client experience of not more than 3 similar projects with clear scope, timeline and results. Must be relevant.; Summary of understanding of engagement, this may be presented in an executive summary; and Internal methodology and processes including conflict resolution methodology.

3. Must have 35 or more CRM certified consultants

To submit: Company organization chart with names of CRM certified employees; Structure of project; Certification of 1 copy each per CRM consultant from Huma Resources Division for CRM consultant employees; Project Manager: Examples of at least 1 Curriculum Vitae of relevant resource who would be available for this engagement. Knowledge Transfer (post 'go-live'): Full knowledge transfer plan, including full training plan for different levels of users. Clearly identify what knowledge/training documentation will be provided; Project plan with mobilization: Complete project plan with description of phases, deliverables as per Scope of Work, and milestones. Location on how work is to be facilitated must be clearly outlined.; Clear resource plan required with confirmation of availability of relevant resources in appropriate methodology, including processes and sign off of authority level/roles.; Technical Support: Description of channels available to client for reporting issues and inquiries. Provide proposed service level agreements for answering inquiries and resolution of issues.; Disaster Mitigation: Description of plans and validation procedure.

4. Must be a highly certified company by an international organization for 4 years or more, with marketing cloud certified consultants and with at least 5 successful/significant project implementation in the Philippines in marketing cloud

To submit: Partnership certificate or documentation; Reseller certificate.

5. Must have a compelling and clear presentation before CITEM officers about its products and services, with the presence of at least 1 Asean regional executive

To submit: Presentation Materials before Technical Working Group.

SCOPE OF WORK

Cloud-Based Customer Relations Management System	
<i>Features</i>	<i>Valuation (in Peso)</i>
1. One-Year Subscription	8,300,000
Marketing Automation System	
Messaging capability of more than 20 million/year	
Can accommodate more than 90,000 contacts	
More than 40 marketing automation users (Roles as administrators, viewer, channel manager, security administrator, content editor/publisher)	
1,000 social media users (Roles as administrators, Super User, Full User, Basic User)	
Social Media Marketing Tool	
Can accommodate 18 social media accounts	

Can accommodate 100 Topic Profiles within a single Tenant	
Can accommodate 250,000 social media mentions monthly	

The company that would provide a cloud-based CRM system shall be in charge of the following undertakings:

Item	Specification	Statement of Compliance																																								
A. Deliverables	Create Marketing Automation System																																									
One Year Subscription: Marketing Automation	<p>This powerful Marketing Automation System will help the agency develop and manage its marketing relationships and campaigns with various stakeholders.</p> <p>This platform will further equip CITEM with valuable data across numerous sources to have a holistic understanding of what its stakeholders want. Through this CRM, CITEM can listen and deduct its stakeholders' intent; allowing the project officers and internal stakeholders as well to craft a customized messaging and improve buyer engagement eventually.</p> <table border="1" data-bbox="386 835 1224 1890"> <tr> <td data-bbox="386 835 592 1060">Marketing Automation Feature</td> <td data-bbox="592 835 792 1060">Marketing Automation Creation</td> <td data-bbox="792 835 1019 1060"> Set Up Business Unit Administration Settings <ul style="list-style-type: none"> • Account Settings • Headers & Footers • Users (almost 50) • Security Settings </td> <td data-bbox="1019 835 1224 1060">Users are created with designated roles and access</td> </tr> <tr> <td data-bbox="386 1060 592 1129">Marketing Automation Feature</td> <td data-bbox="592 1060 792 1129">Email Marketing System Creation</td> <td data-bbox="792 1060 1019 1129">Create Data Extensions/Lists</td> <td data-bbox="1019 1060 1224 1129">Storage availability for Sendable and Non- Sendable 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Image • Video • Audio • Code • Text </td> <td data-bbox="1019 1352 1224 1518">Storage of all assets for email content</td> </tr> <tr> <td data-bbox="386 1518 592 1587">CRM Feature</td> <td data-bbox="592 1518 792 1587">Audience Builder Creation</td> <td data-bbox="792 1518 1019 1587">Create Import Definitions</td> <td data-bbox="1019 1518 1224 1587">Automation of import of data to lists & data extensions</td> </tr> <tr> <td data-bbox="386 1587 592 1656">CRM Feature</td> <td data-bbox="592 1587 792 1656">Email Marketing System Creation</td> <td data-bbox="792 1587 1019 1656">Validate Sends Tracking</td> <td data-bbox="1019 1587 1224 1656">Verify customer activity for email interaction</td> </tr> <tr> <td data-bbox="386 1656 592 1726">CRM Feature</td> <td data-bbox="592 1656 792 1726">Email Marketing System Creation</td> <td data-bbox="792 1656 1019 1726">Create Sender Profiles</td> <td data-bbox="1019 1656 1224 1726">Additional FROM label for email sending</td> </tr> <tr> <td 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Sendable and Non- Sendable data	Marketing Automation Feature	Audience Builder Creation	Setup Contact Builder Create Attribute Groups Create Populations	Single view of all data with relationship can be accessed	Marketing Automation Feature	Email Marketing System Creation	Setup FTP Account <ul style="list-style-type: none"> • Create credentials • Validate FTP connectivity 	Data storage for file transfer is active	Marketing Automation Feature	Email Marketing System Creation	Upload Content files for Email Creation <ul style="list-style-type: none"> • Image • Video • Audio • Code • Text 	Storage of all assets for email content	CRM Feature	Audience Builder Creation	Create Import Definitions	Automation of import of data to lists & data extensions	CRM Feature	Email Marketing System Creation	Validate Sends Tracking	Verify customer activity for email interaction	CRM Feature	Email Marketing System Creation	Create Sender Profiles	Additional FROM label for email sending	CRM Feature	Email Marketing 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		Email Marketing System Creation	Create Email Sends Definitions	
	Marketing Automation Feature	Approvals	Set up a process for reviewing and approving various objects	Emails prior send out requires to undergo an approval process.
	Marketing Automation Setup	Email Marketing System Creation	Create Measures	Additional filter for sent/undelivered email criteria
	Marketing Automation Feature	Email Marketing System Creation	Create Data Filters	Data filter for sent/undelivered emails
	Marketing Automation Feature	User(s) Journey Creation	Create 4 Interactions in Journey Builder	4 interactions for personalized customer experience
	Marketing Automation Feature	Automation Creation	Create Automations	Automation for data management
			• SQL Query	
			• Filters	
			• Import File	
			• File Transfer	
			• Data Extract	
	Analytics Builder	Reports	Automation for reports	CITEM will automatically have access to all standard reports available in Marketing Automation
	Knowledge Transfer	Marketing Automation	Explanation of how to configure Marketing Automation(at least 25 training hours)	CITEM will have knowledge of how to configure the Marketing Automation, and what campaigns are best suited to each type of use case.

B. One-Year Subscription: Social Media Marketing Tool	<i>Creation of Social Media Marketing Tool</i>			
	<p>This tool must have the capability to listen from any digital platform sources (up to 18 CITEM digital social channels) to obtain what the fans and the concerned industry are saying about CITEM and its brands.</p> <p>This tool must allow CITEM and its brands to respond to posts on its social channels, manage respective communities, and deliver customer support in the process. This tool must allow CITEM and its brands to create and publish content across networks and accounts.</p> <p>This tool must allow officers responsible for CITEM and its brands to extract insightful reports at the same time see live displays of activities on social platforms. Such monitoring capability can be done using one interface.</p>			
	Social Media Marketing Tool Feature	Create Social Accounts	Configure all Social Media Accounts	Social Accounts are available for use for different workspaces
		Create Engagement Macros	Configure macros for easy tagging and assignment of posts for each user	Users will be able to assign posts to other users
User Setup		Creation and setup of required Users:	Administrator and users will have to the Social Media Marketing System access based on given role.	
		• Administrator		
	• Super Users			
	• Full Users			
	• Basic Users			

		<p>Create Topic Profile</p> <p>Setup of Topic Profiles for broad listening:</p> <ul style="list-style-type: none"> Up to four (4) profiles Up to six (6) Keyword Groups per profile 	<p>Broad listening profiles will be capturing branded conversation outside of official social channels.</p>
		<p>Data Validation</p> <p>Validation of data capture by topic profiles.</p>	<p>Ensure that broad listening profiles are capturing desired data.</p>
		<p>Source Group Creation</p> <p>Addition of multiple website (blogs,forums,mainstream news) for:</p> <ul style="list-style-type: none"> Monitoring keywords; Monitoring entire page; and Excluding pages from selected websites 	<p>Monitoring of specific pages, groups, people in social media is captured</p>
		<p>Sentiment Model Creation</p> <p>Model Management for:</p> <p>Adjustment of incoming posts that uses a specific language</p>	<p>Keywords added will have different sentiment scores</p>
		<p>Organization Settings</p> <p>Standardized settings for all users</p>	<p>All users will have the same basic organization configurations</p>
		<p>Workspace Creation</p> <p>Set up of required Workspaces</p> <p>Up to four (4) workspaces</p>	<p>Workspaces will be available to segment users, profiles, and social accounts by different criteria.</p>
		<p>User Workspace Settings</p> <p>Addition and setup of required Users (unlimited):</p> <ul style="list-style-type: none"> Admin Contributor Limited Member 	<p>User will have full/limited access within a workspace based on their roles</p>
		<p>Social Workspace Settings</p> <p>Linking of integrated Social Accounts to specific Workspaces</p>	<p>Social accounts are assigned to workspaces</p>
		<p>Topic Profile Workspace Settings</p> <p>Linking of created Topic Profiles to specific Workspaces</p>	<p>Topic profiles are assigned to workspaces</p>
		<p>Engagement Macros Workspace Settings</p> <p>Linking of created Engagement Macros to specific Workspaces</p>	<p>Engagement Macros are assigned to workspaces</p>
		<p>Template Workspace Settings</p> <p>Creation of templates for use of different users within a Workspace</p>	<p>New users within a workspace will automatically have a tab or users are able to use templates for easy creation of tabs within Engage component</p>
		<p>Engage Workspace Settings</p> <p>Creation of tabs and columns for:</p> <ul style="list-style-type: none"> Monitoring of personal Social Accounts Monitoring of brand- related web posts 	<p>Users can monitor different social media accounts based on keywords given; also, able to reply to posts if Social Media account for post is</p>

			<ul style="list-style-type: none"> outside of your own social media accounts Monitoring of Competitor's posts and pages 	integrated	
			Monitoring of industry-related posts		
	Analyze Workspace Settings		Dashboard creation for:	Summary of reports for Social Media Engagement and Keywords provided	
			<ul style="list-style-type: none"> Social Media Accounts Topic Profiles 		
	Reports Workspace Settings		Automation for reports generated	Reports are generated via CSV and/or PDF file on a specified time automatically	
Knowledge Transfer	Social Media Marketing System	Explanation of Social Media Marketing System Setup and data configuration:		CITEM will have knowledge of how Social Media Marketing System is configured, and how changes can be made.	
		<ul style="list-style-type: none"> Workspaces Social Accounts Topic Profiles 			
	<p>For the Marketing Automation System and Social Media Marketing Tool, CITEM will provide Winning Bidder with an application programming interface to allow the CRM to capture data from different digital platforms the agency is using now.</p>				
VI. PROJECT DURATION	The contract shall take effect upon the Winning Bidder's actual receipt of the Notice of Award (NOA) and shall remain in force and in effect for a period of twelve (12) months.				
VII. OWNERSHIP	All creative concepts and original materials formulated and designed in conjunction with this project shall be exclusively owned by CITEM, and with full exercise of discretion and rights on future use.				
VIII. PAYMENT TERMS	<p>FULL PAYMENT</p> <p>Turnover of Licenses through Signed Agreement Winning Bidder to issue invoice for Social Media Marketing and Marketing Automation System licenses.</p> <p>Total Amount: 100%</p>				
IX. BUDGET	Eight Million Three Hundred Thousand Pesos (PHP8,300,000.00) inclusive of all applicable taxes				
X. NON-DISCLOSURE AND CONFIDENTIAL INFORMATION	The Winning Bidder shall treat as confidential all information provided by CITEM related to the agreement that will arise from this Terms of Reference, including but not limited to its business and operations. All confidential information provided by CITEM shall be used by the Winning Bidder solely for the purposes of rendering services pursuant to the agreement signed by both parties.				

Qualitative Evaluation Documents

Document Required	Statement of Compliance
<p>Submit proof(s) that bidder is a Philippine registered company that is an expert in providing a cloud-based solution on customer relationship management service and complementary enterprise application suites, with focused points on: marketing automation, customer service, application development, and analytics.</p> <p>The documentary requirement proof must contain the following:</p> <ul style="list-style-type: none"> • Company profile and services • Organizational chart and outline of responsibilities including hierarchy and authorization (sign off authority points) 	
<p>Submit proof(s) that bidder has more than 100 successful CRM project implementations.</p> <ul style="list-style-type: none"> • List of projects implemented with <i>any</i> of the following: User Acceptance Testing, GoLive Certificate, Signed Order Form • Outline of client experience of not more than 3 similar projects with clear scope, timeline and results. Must be relevant. • Summary of understanding of engagement, this may be presented in an executive summary; and Internal methodology and processes including conflict resolution methodology. 	
<p>Submit proof(s) that bidder has 35 or more CRM-certified consultants. Proof must contain the following:</p> <ul style="list-style-type: none"> • Company organization chart with names of CRM certified employees. • Structure of project. • Certification of 1 copy each per CRM consultant from Human Resources Division for CRM consultant employees. • Project Manager: Examples of at least 1 Curriculum Vitae of relevant resource who would be available for this engagement. • Knowledge Transfer (post 'go-live'): Full knowledge transfer plan, including full training plan for different levels of users. Clearly identify what knowledge/training documentation will be provided. • Project plan with mobilization: Complete project plan with description of phases, deliverables as per Scope of Work, and milestones. Location on how work is to be facilitated must be clearly outlined. • Clear resource plan required with confirmation of availability of relevant resources in appropriate methodology, including processes and sign off of 	

<p>authority level/roles.</p> <ul style="list-style-type: none"> • Technical Support: Description of channels available to client for reporting issues and inquiries. Provide proposed service level agreements for answering inquiries and resolution of issues. • Disaster Mitigation: Description of plans and validation procedure. 	
<p>Submit proof(s) that bidder is a highly certified company by an international organization for 4 years or more, with marketing cloud certified consultants and with at least 5 successful/significant project implementation in the Philippines in marketing cloud. Proof must include:</p> <ul style="list-style-type: none"> • Partnership certificate or documentation; • Reseller certificate. 	
<p>Prepare a compelling and clear presentation before CITEM officers about its products and services, with the presence of at least 1 Asean regional executive The bidder must submit the following:</p> <ul style="list-style-type: none"> • Presentation Materials before Technical Working Group 	

I hereby certify that the statement of compliance to the foregoing Technical Specifications are true and correct, otherwise, if found to be false either during bid evaluation or post-qualification, the same shall result to automatic disqualification of our bid.

CERTIFIED CORRECT:

Name & Signature of Authorized Representative

Position

Qualitative Evaluation and Technical Bid

Passing Score: 95 points

To fully satisfy and not compromise the quality of the requirements, a qualitative evaluation is necessary in the selection process. Bidder shall be required to submit the following requirements which will be used to evaluate his/her qualifications.

PARTICULARS	POINTS
1. The Philippine registered company must be an expert in providing a cloud- based solution on customer relationship management service and complementary enterprise application suites, with focused points on: marketing automation, customer service, application development, and analytics. (35 Points)	
With 7 years or more expertise in providing premium cloud-based solution on customer relationship management service and complementary enterprise application suites	35 points
With 5-6 years expertise in providing premium cloud-based solution on customer relationship management service and complementary enterprise application suites	30 points
With 4 years and below expertise in providing premium cloud- based solution on customer relationship management service and complementary enterprise application suites	25 points
2. Must have more than 100 successful CRM project implementations. (25 Points)	
With 100 and more successful CRM project implementations	25 points
With 75 – 99 successful CRM project implementations	20 points
With 74 and below successful CRM project implementations	15 points
3. Must have 35 or more CRM certified consultants (15 POINTS)	
With 35 and more CRM certified consultants	15 points
With 16-34 CRM certified consultants	10 points
With 1-15 CRM certified consultants	5 points
4. Must be a highly certified company by an international organization for 4 years or more, with marketing cloud certified consultants and with at least 5 successful/significant	

project implementation in the Philippines in marketing cloud (15 points)		
	With certification from an international organization for 4 years and above	15 points
	With certification from an international organization for 3 years and below	10 points
5. Must have a compelling and clear presentation before CITEM officers about its products and services, with the presence of at least 1 Asean regional executive (10 points)		
	With compelling and clear presentation before CITEM officers about its products and services, with the presence of at least 1 Asean regional executive	10 points
	Without a compelling and clear presentation before CITEM officers about its products and services, with the presence of at least 1 Asean regional executive	0 point

*Note: **The Candidate must get a passing point of at least 95 points.**
Evaluation shall be made by an in-house panel from CITEM.*

Section VIII. Checklist of Technical and Financial Documents

I. TECHNICAL COMPONENT ENVELOPE

Class "A" Documents

Legal Documents

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

Technical Documents

- (e) Statement of the prospective bidder of all its ongoing government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid; **and**
- (f) Statement of the bidder's Single Largest Completed Contract (SLCC) similar to the contract to be bid, except under conditions provided for in Sections 23.4.1.3 and 23.4.2.4 of the 2016 revised IRR of RA No. 9184, within the relevant period as provided in the Bidding Documents; **and**
- (g) Original copy of Bid Security. If in the form of a Surety Bond, submit also a certification issued by the Insurance Commission;
or
Original copy of Notarized Bid Securing Declaration; **and**
- (h) Conformity with the Technical Specifications, which may include production/delivery schedule, manpower requirements, and/or after-sales/parts, if applicable; **and**
- (i) Original duly signed Omnibus Sworn Statement (OSS);
and if applicable, Original Notarized Secretary's Certificate in case of a corporation, partnership, or cooperative; or Original Special Power of Attorney of all members of the joint venture giving full power and authority to its officer to sign the OSS and do acts to represent the Bidder.

Financial Documents

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

- (k) The prospective bidder's computation of Net Financial Contracting Capacity (NFCC); **or**
A committed Line of Credit from a Universal or Commercial Bank in lieu of its NFCC computation.

Class "B" Documents

- (l) If applicable, a duly signed joint venture agreement (JVA) in case the joint venture is already in existence;
or
duly notarized statements from all the potential joint venture partners stating that they will enter into and abide by the provisions of the JVA in the instance that the bid is successful.

II. FINANCIAL COMPONENT ENVELOPE

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

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

- (o) *[For foreign bidders claiming by reason of their country's extension of reciprocal rights to Filipinos]* Certification from the relevant government office of their country stating that Filipinos are allowed to participate in government procurement activities for the same item or product.
- (p) Certification from the DTI if the Bidder claims preference as a Domestic Bidder or Domestic Entity.

