



**Philippine International Trading Corporation  
BIDS & AWARDS COMMITTEE I**

MINUTES OF THE PRE-BID CONFERENCE  
LEASE-TO-OWN OF DOCUMENT MANAGEMENT SYSTEM  
FOR THE BUREAU OF CUSTOMS (BOC)  
**BID REF. NO. GPG-B1-2020-070**  
10 January 2020, 5<sup>th</sup> Floor Conference Room

There being a quorum, Vice-Chair convened the meeting at 3:05

In attendance are:

FOR PITC BAC-I
Atty. Ma. Gudelia C. Guese, Vice-Chair
Myra T. Alvarez, Member
David A. Inocencio, Member
Joel S. Rodriguez, Member
PITC TWG/BAC Secretariat (as per attached attendance Sheet)

FOR PROPONENT – BOC
As per attached attendance sheet

**HIGHLIGHTS OF PROCEEDINGS:**

- Vice-Chair welcomed everyone to the pre-bid conference for the Lease-to-own of Document Management System for the Bureau of Customs. After which, Vice-Chair introduced the BAC members and BOC Representative/s.
- Vice-Chair acknowledged the presence of the following prospective bidders present in this pre-bid conference; namely:
 

1) Cosmotech Philippines, Inc.	7) RFS Solutions, Inc.
2) Metasystems	8) JC Total Solution
3) I3 Solutions, Inc. / Massive Integrated Tech Solution	9) Trans Outsourcing Provider Intl.
4) Beehive Technologies	10) Omni Prime
5) Systems and Software Consulting Group Inc.	11) Microdata Systems & Mgt. Inc.
6) Ecopy Corporation	
- Vice-Chair informed that to be able to participate in this bid project, the prospective Bidder must have completed a contract of similar nature within last five (5) years from the date of submission and receipt of bids as follows:
  - a) Single completed contract of similar nature within the last five (5) years equivalent to at least fifty percent (50%) of the ABC; **OR**
  - b) At least two (2) completed contracts of similar nature within the last five (5) years from the date of submission and receipt of bids and the aggregate contract amounts should be equivalent to at least fifty percent (50%) of the ABC. The largest of these similar contracts must be equivalent to at least twenty-five percent (25%) of the ABC.

Similar contract shall mean "Lease-to-Own of Office Equipment/IT equipment that includes the delivery of both equipment and application system".

- At the same time, this bid project is open to eligible Supplier/Distributor/Reseller of Document Management System for the Lease-to-Own of Document Management System for the Bureau of Customs (BOC) who must be Filipino citizens / sole proprietorships, partnerships, or organization with at least sixty percent (60%) interest or outstanding capital stock belonging citizens of the Philippines.
- Vice-Chair explained that the first part of the Bidding Documents is the Instructions to Bidders which should be read by the prospective Bidders at their own good time. What will be discussed in this pre-bid conference are the documents that are required to be submitted on Bid Opening Day;

- Vice-Chair started to discuss the Envelope System:
  - **Envelope System:** The system of submission is a two envelope system wherein **Envelope 1** will contain the eligibility and technical documents and **Envelope 2** will only contain the Financial Bid.
  - **Number of Copies:** All documentary submission must come in three sets. These will be placed in 3 folders marked: "original", "duplicate" and "triplicate".
  - **Sealing/Markings:** The two envelopes will then be placed in a master envelope. The master envelope will then be sealed and marked in accordance with the instructions stated in the Bidding Documents.

**ENVELOPE I – ELIGIBILITY & TECHNICAL DOCUMENTS**

Class "A" Eligibility Documents	Vice-Chair's Instructions
SEC/DTI Registration Certificate	<p><b>For Corporation</b>, submission will be the SEC Registration Certificate.</p> <p><b>For the Sole Proprietorship</b> a copy of valid and current DTI business registration; and</p> <p><b>For Cooperatives</b> a copy of valid and current Cooperative Development Authority (CDA)</p>
Business Permit issued by the city or municipality where the place of business is located OR the equivalent document for Exclusive Economic Zones or Areas.	<p>Bidders must submit a valid and current Mayor's Permit.</p> <p>In case of recently expired Mayor's/Business Permits, it shall be accepted together with the official receipt as proof that the bidder has applied for renewal within the period prescribed by the concerned local government unit, provided that the renewed permit shall be submitted as post-qualification requirement.</p>
Valid and Current Tax Clearance	<p>Bidders must submit their valid and current Tax Clearance per Executive Order 398 and Revenue Memorandum Order No. 46-2018.</p> <p>Vice-Chair informed the bidders that PITC does not accept any provisional Tax Clearance, renewal certificate or claim stub because the GPPB has already issued a ruling that only the Tax Clearance itself is acceptable.</p> <p>Vice-Chair advised Bidders to only transact with legitimate employees of BIR.</p>
Audited Financial Statements for 2018 and 2017	<p>Submission will be the 2018 and 2017 Audited Financial Statements comprising of: Independent Auditor's Report, Balance Sheet and Income Statements, all pages of which must have the stamp "Received" by the BIR.</p>
Valid and Current PhilGEPS Certificate of Registration and Membership (Platinum Registration).	<p>If a Bidder is already a PhilGEPS Platinum Member he can submit the Platinum Membership Certificate together with the Annex "A". The Platinum Membership will substitute for the four (4) eligibility documents enumerated earlier.</p> <p>However, if any of the documents listed in Annex A of the certificate has expired Bidders must submit the valid and current one.</p> <p>Vice-Chair emphasized that any documents that have expired, the valid and current document together with the PhilGEPS Certificate must be submitted.</p>

<p><b>Annex I</b> Statement of all Ongoing government and private contracts including contracts awarded but not yet started</p>	<p>Vice-Chair's instructions to the Bidders with respect to this document is:</p> <ul style="list-style-type: none"> <li>• Form Annex I is already provided in the Bidding Documents. Bidders to use Annex I;</li> <li>• Bidders to provide the information called for;</li> <li>• Additional sheets can be used for as long as the authorized representative signs the last page.</li> </ul>
<p><b>Annex I-A</b> Statement of Single Largest Contract similar to the contract being bid within the last 5 yrs. equivalent to at least 50% of the ABC.</p> <p>a. Single completed contract of similar nature within the last five (5) years equivalent to at least fifty percent (50%) of the ABC; <b>OR</b></p> <p>b. At least two (2) completed contracts of similar nature within the last five (5) years from the date of submission and receipt of bids and the aggregate contract amounts should be equivalent to at least fifty percent (50%) of the ABC. The largest of these similar contracts must be equivalent to at least twenty-five percent (25%) of the ABC</p>	<ul style="list-style-type: none"> <li>• A form is again provided;</li> <li>• Bidders to supply the data or information required in the form and to attach any of the following documents: <ol style="list-style-type: none"> <li>1. End User's Acceptance</li> <li>2. Copy of Official Receipt;</li> <li>3. Sales Invoice with Collection Receipt (<i>They go together</i>)</li> </ol> </li> </ul>
<p>Net Financial Contracting Capacity (NFCC)</p> <p>Committed Line of Credit (CLC)</p>	<p><b>For NFCC</b> - A form is provided for as <b>Annex II</b>;</p> <p>As the sample form was flashed on the screen, Vice-Chair's instructions is for the Bidder to supply the necessary details as required. A formula is already provided for the bidder to come up with the NFCC.</p> <p>The NFCC must at least be equal to the ABC of the project.</p> <p><b>For CLC</b> - A sample form is provided for as <b>Annex II-A</b>.</p> <p>In case Bidders does not want to submit the NFCC, they have an option to submit Committed Line of Credit, issued by a local commercial/Universal Bank.</p> <p>Vice-Chair reminded the Bidders that the Committee does not accept any CLC issued by a Rural Bank or Savings Bank.</p>
<p><b>Class "B" Documents</b> For Joint Ventures</p>	<p>Since Bidders will not enter into Joint Venture, Vice-Chair skipped to discuss this portion but just in case the requirements for Joint Venture can be found in the Bid Data Sheet, ITB Clause 12.1 pages 35 to 36 of the Bidding Documents.</p>
<p><b>Technical Documents</b></p>	<p><b>Vice-Chair's Instructions</b></p>
<p><b>Annex IV</b> Bid Security</p>	<p>Vice-Chair enumerated the types of Bid Security acceptable to PITC. These are:</p> <p><b>a. Bid Securing Declaration</b> - A form is provided for as <b>Annex IV</b>.</p> <p>Bidders should use the form provided by PITC because it is complete in contents.</p>

	<p>In order not to miss out on anything, Vice-Chair advised Bidders to photocopy the form or scan it, and then have the authorized representative sign the form and submit it notarized.</p> <p>The other forms of Bid Security are:</p> <ul style="list-style-type: none"> <li><b>b. Cash or Manager's Check issued by the local commercial/universal bank equivalent to at least 2% of the ABC;</b></li> <li><b>c. A Bank Draft / Bank Guarantee or Irrevocable LC equivalent to at least 2% of the ABC; OR</b></li> <li><b>d. Surety Bond callable upon demand equivalent to at least 5% of the ABC.</b></li> </ul> <p>In case Bidders will opt for a Surety Bond, The Bidder has to submit a Certification from the Insurance Commission that the bonding company is authorized to issue Surety Bond. In addition to this, the Surety Bond should contain all the 14 grounds for the forfeiture of the Bid Security and it be written on Bond Itself.</p> <p>Vice-Chair advised the Bidders to show the 14 grounds to their bonding company so that the latter can include or type them on the copy of the bond itself.</p> <p>The fourteen (14) grounds is found in Clause 12.1(b) (i) (c) (3) (i) to (xiv) of the Bid Data Sheet.</p>
<p><b>Annex V</b> Technical Bid Form</p>	<p>As the Technical Bid Form was flashed on the screen Vice-Chair's instructions are as follows:</p> <ul style="list-style-type: none"> <li>• There is an instruction on the top most part of the form that states "Please use the Bid Form. Do not retype or alter";</li> <li>• Bidders to put the word "<b>Comply</b>" in every line item on the column "Bidder's Statement of Compliance";</li> <li>• All three (3) pages must be signed by the authorized representative of the Bidder.</li> </ul> <p>Vice-Chair reminded the Bidder that if there are any blanks left out unfilled, the TBF will fail because it will mean that the Bidder cannot comply with the technical specifications.</p>
<p><b>Annex V-A</b> Terms of Reference of BOC</p>	<ul style="list-style-type: none"> <li>• Bidder's authorized representative/s to sign the "Conforme" box provided on all pages.</li> </ul>
<p><b>Annex V-A1</b> Test and Functionality Checklist of BOC</p>	
<p>Brochure / Technical Data Sheet / Latest Manual / Reference Document / Web Links</p>	<p>Bidders to submit a Brochure/Technical Data Sheet/Latest Manual/Reference Document/Web Links: and/or of the equipment being offered showing compliance to the technical specifications.</p> <ol style="list-style-type: none"> <li>1. Documents Scanner</li> <li>2. Barcode Reader</li> <li>3. Barcode Printer</li> </ol> <p><b>FOR DMS</b></p> <ol style="list-style-type: none"> <li>4. DMS User Guide</li> <li>5. DMS Operational Manual</li> <li>6. Reference Manual</li> </ol> <p>Vice-Chair emphasized that Bidder must put separator in the Brochure so that the TWG will find the <i>document easily.</i></p> <p>Note: If not in English, must be subject to requirement per Clause 11 of the Instruction to Bidders.</p>

Copy of valid and current ISO 9001 Certification	<p>Bidders to submit a copy of valid and current <b>ISO 9001 Certification</b> in the name of the Manufacturer issued by an independent certifying agency. The ISO 9001 Certification must cover the manufacture/design or production of the item subject to this Bid Project.</p> <ol style="list-style-type: none"> <li>1. Documents Scanner</li> <li>2. Barcode Reader</li> <li>3. Barcode Printer</li> </ol>
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- Vice-Chair paused a moment to emphasized that if bidders have a concern in any of the requirements, they should raise it in writing and send it to the PITC BAC (*Request for Clarification address are found in Bid Data Sheet ITB Clause 10 page 33 of 110 in the Bidding Documents*) and the Committee will reply through Bid Bulletin which will be posted in PhilGEPS and PITC website ([www.pitc.gov.ph](http://www.pitc.gov.ph)).

List of Authorized Service Center/s	<p>Bidders to submit a List of Authorized Service Center/s in the <b>Philippines</b> (with available spare parts, indicating address, telephone &amp; fax numbers, email address and contact person).</p> <ol style="list-style-type: none"> <li>1. Documents Scanner</li> <li>2. Barcode Reader</li> <li>3. Barcode Printer</li> </ol>
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<b>Annex VI</b> Certificate of Performance Evaluation	<p>The Committee wants to make sure that the Bidders has a good record with his client. As such, Bidders has to go back to the client which they identified in Annex I-A as the completed contract client/s.</p> <p>Bidders to present this form to their client and request the SLCC to transpose the form in their letterhead and then rate the Bidder. The rating should be at least <b>Satisfactory</b>.</p> <p>Vice-Chair emphasized that the form must be in the company letterhead of Bidder's Single Largest Completed Contract Client/s.</p>
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Proof of Authority of the Designated Representative	<p>Submission of a Proof of Authority of the Bidder's Authorized Representative:</p> <ol style="list-style-type: none"> <li>a) For Sole Proprietorship submission of Duly Notarized Special Power of Attorney;</li> <li>b) For Corporation, Cooperative, or the Members of the Joint Venture submission of Duly Notarized Secretary's Certificate evidencing the authority of the designated representative/s.</li> </ol> <p>Once again, Vice-Chair advised Bidders to check the wordings. In case the Board appoints more than one person, it is safe that it be worded "any of the following" or "or" so that even only one person can bind the company.</p> <p>However, if not stated this way, then the Committee will look for all the names and signatures of the persons named in the Secretary's Certificate. And if one signature is missing, the submission is non-compliant and will fail.</p>
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<b>Annex VII</b> Omnibus Sworn Statement (OSS)	<p>Vice-Chair informed that the OSS is standard in all government biddings.</p> <p>Vice-Chair advised Bidders to use the form that PITC provided in this Bidding Document.</p> <p><b>The form must be copied verbatim.</b> But to be sure that nothing is missed out, Vice-Chair suggested that the form just be scanned or photocopied and then filled up.</p>
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	<p>On the "I/We", the name of the authorized representative named in the Secretary's Certificate will appear on the line.</p> <p>All blanks must be filled up, appropriate boxes must be ticked off.</p> <p>On the Authority of the Designated Representative, the portion: <u>Name, Title and Specimen Signature</u> must be filled up.</p> <p>All statements from "a" to "h" must be complete.</p> <p>The last page must be signed by the authorized representative and notarized.</p> <p>Vice-Chair reminded the Bidders to double check if the Omnibus Sworn Statement (OSS) is notarized.</p>
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**ENVELOPE 2 – FINANCIAL ENVELOPE**

<p><b>Annex VIII</b> Financial Bid Form</p>	<p>Envelope 2 will contain the Financial Bid of the Bidders. Vice-Chair's instructions are as follows:</p> <ul style="list-style-type: none"> <li>• Bidder has to indicate the bid amount both in figures and in words in the Financial Bid Form;</li> <li>• Bidder must fill out all line items. If an item is to be given free, bidder must indicate "0";</li> <li>• Forms to be signed by the bidder's authorized representative</li> </ul> <p>Vice-Chair explained that the Financial Bid Form cannot be retyped. It may be photocopied for purpose of the other 2 copies required.</p>
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- The Vice-Chair opened the floor for questions/clarifications. Hereunder are the details:

Bidder's Query/Clarification/s	Committee's Reply
Cosmotech: for the Single Largest, does it really need to "Lease-to-own"?	
	Yes, it has to be "Lease-to-own" But if you have concerns in this particular requirement of BOC you may raise it and we will deliberate the matter with BOC.
Ecopy: also the same with her concern, we only have projects that are Lease or rental and the similar contract of "Lease-to-Own of Office Equipment/IT equipment that includes the delivery of both equipment and application system" can we submit the 25% project for Office equipment and then another 25%?	
	Separate Contract? Sir, I request that you put your concern in writing and send it to the PITC BAC so we can reply to you appropriately.
	Our reply will be through a Bid Bulletin and we will not reply to you individually, it will be your responsible to check the PhilGEPS/PITC website from time to time to check if we update Notices or issue Supplemental Bid Bulletin.
	Anyway you're not limited to today to raise your questions, you can submit your letter as early as tomorrow and especially to the new bidders do not assume that your own interpretation is correct if you have any concerns in any of the requirement raise it in writing so that you can clarify with us on what do we mean by those requirements.

For the Technical Bid Form, can we ask for a soft copy in word format?	
	No, the bidding documents are downloadable in PhilGEPS and PITC website and we already guided you on what to do in the forms because some bidders convert the forms into word format and missed out a line no. then the Bid Submission is incomplete, that's why we don't suggest it.
	And if in case you have questions that the forms will be affected and we issue a revised forms please use the revised forms. Do not just correct the form, use the one we issue in a Bid Bulletin.
	Vice-Chair also briefed the bidders that PITC is also a Government who have been tasked by BOC, engaged as procurement agent to procure for them so PITC are the procurement entity, the head of procuring entity is the president so if you acquire any information outside of the PITC Committee we will disown those information and you might be misled, so we suggest that if you have any questions you may raise it to us and we will reply to you in a Bid Bulletin.
	Any other concerns?
Trans Outsourcing: In the technical bid, do you really require to submit the manual for the User Guide, Operational Manual and Reference Manual?	
	BOC: Please raise it in writing.
	Vice-Chair: Why sir? Do you any concerns with that?
Because its thousand pages	
	Vice-Chair: does it have electronic copy?
Yes.	
	Maybe you can write if it's okay to have an option to submit electronic copy.
That's why I am wondering why you ask for a manual since its corporate knowledge.	
	Vice-Chair: I will refer you to the End-users because they're the one who require those requirement.
Also for the technical issue this is 250 users to be trained and 70,000 simultaneously for current users same time and my questions is how many user license do you need for the DMS?	
	BOC: in the DMS, we hope the user is unlimited, because if you will see in the Tech specs it can be open to the public it should've portal because the public can use that portal to submit documents because we have the existing we call doc tracking system and that will be the replacement
So the public can create own username?	
	No sir, they can create but there should be an approval.
It's for public but it has tracking inside?	
	BOC: Yes sir, technically it's both public and internal.
So the public sir unlimited page per user?	
	BOC: Yes sir.
Axis Solutions: question in the technical, the DMS will be installed at the Server?	
	BOC: Yes.
In the port area?	
	BOC: Yes.
Trans Outsourcing: you will provide the DMS hardware	
	BOC: Yes sir.

Who will be providing the license of the DMS?	
	BOC: The winning bidder sir.
	BOC: we will also include the OS Application.
Scanning Service - Scanning of Approximately 800,000 pages plus number of pages, is it without records?	
	BOC: 800,000 pages sir, one is to one.
	BOC: one document can contain ten pages, we are talking about pages.
So you don't have record sir?	
	BOC: we don't have
But we will encode?	
	BOC: 800,000 pages sir.
Follow up question regarding the index of scanned files, how many index per page? or how many fields we will index per page?	
	BOC: for now we don't have, but at least we already talked to the record section as much as possible because typical service in BOC documents have subject, at least sana sobra yung subject because usually yung hina-hanap na word wala sa subject.
	Vice-Chair: if there are no other concerns, thank you and we will wait for your letter.
	Vice-Chair: Also, If in case you're interested to join, please pay for the Bidding Documents way ahead the deadline of the Bid Opening because our BAC Secretariat does not accept late bids.

**OTHER MATTERS:**

- Bidders must **sign** or **initial** each and every interlineation, erasure, overwriting and correction made on their bids. Failure to do so shall result in the invalidation and rejection of their bids.
- Vice-Chair would like the prospective bidders to take special note on the Additional Requirement for whoever will be declared Single/Lowest Calculated Bid a Proof of Concept, presentation of capability and site visit to verify implementation of a DMS Project within fifteen (15) calendar days upon receipt of Notice to Present.

**BAC SCHEDULE:**

- Bidders can send queries/concerns until **21 January 2020** (Tuesday)
- The Bid Opening is scheduled on **31 January 2020** (Friday, 3:00 PM)

Adjourned at 4:00 P.M.

MINUTES TAKEN BY:

  
**MA. VERONICA A. MORALES**  
 Head, BAC-I Secretariat  
 LMC

REVIEWED BY:

  
**ATTY. MARIA GUDELIA C. GUESE**  
 Vice-Chair, BAC-I

APPROVED BY:

  
**CHRISTABELLE P. EBRIEGA**  
 Chairperson, BAC-I