



EXPRESSION OF INTEREST FOR
ENGAGEMENT OF TAX CONSULTANT AT
IIT KHARAGPUR

INDIAN INSTITUTE OF TECHNOLOGY KHARAGPUR

Kharagpur- 721302, Dist: Paschim Medinipur, West Bengal,
INDIA



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Ref No. IITKGP/F&A/TAXCONSLT/23-24/01

Dated: 19th, October 2023

Sub: Engagement of Tax Consultant at IIT Kharagpur

Indian Institute of Technology Kharagpur invites sealed tenders under two bids system (Technical & Price Bid) from reputed Tax Consultant firms experience in handling Direct & Indirect taxation matter as a tax consultant for a period of 1 (one) year as per the qualifying criteria and Terms & Conditions mentioned in the tender hereto. However, the same may be renewed for further period of 2 (two) years, subject to satisfactory performance of each year with the same terms and conditions.

The tender document with complete details of tender including experience required, scope of works and terms and conditions can be downloaded from the website www.iitkharagpur.ac.in and from CPP Portal www.eprocure.gov.in/epublish/app. The last date for submission of sealed tender is **9th, November 2023 at 15.00 hrs**. The technical Bids will be opened on **9th, November 2023 at 15.30 hrs** at the Committee Room of the Institute. The tender shall be submitted to the Registrar, Indian Institute of Technology Kharagpur, P.O. Kharagpur, Dist: Paschim Medinipur, West Bengal- 721302

An EMD of ₹20,000.00 (Rupees Twenty Thousand only) has to be submitted in the form of Demand Draft drawn in favor of "Indian Institute of Technology Kharagpur" payable at Kharagpur.

Tenders received without submission of EMD will be summarily rejected. Late and delayed tenders will be summarily rejected.

The Indian Institute of Technology Kharagpur reserves the right to choose, accept or reject any or all tenders/ requests/offers, in full or part, at any stage without assigning any reason.


Capt Amit Jain (Retd)
Registrar



भारतीय प्रौद्योगिकी संस्थान खड़गपुर

INDIAN INSTITUTE OF TECHNOLOGY KHARAGPUR

Bidding Information Summary

| | |
|--|---|
| Tender No: | IITKGP/F&A/TAX CONSULTANT/2023-24/01 |
| Date: | 19/10/2023 |
| Description of Service | Engagement of Tax Consultant at IIT Kharagpur (both Direct and Indirect taxes) for a period of 1 (one) year. |
| Issue of Tender Document: | The tender document can be downloaded from the Institute's website https://www.iitkharagpur.ac.in and from CPP Portal www.eprocure.gov.in/epublish/app |
| EMD | ₹20,000.00 (Rupees Twenty Thousand only) |
| Last Date of Submission of Bids | 9 th , November 2023 at 15.00 hrs |
| Opening of EOI: | 9 th , November 2023 at 15.30 hrs |
| Pre-EOI Meeting/ Last date for seeking clarifications | Clarifications, if any, regarding tender may be asked in writing through e-mail not later than 26 th October, 2023, by 15.00 hrs on email id. registrar@iitkharagpur.ac.in or shyamal.das@adm.iitkharagpur.ac.in |
| Bid Validity | 90 days from the date of opening of bid. |
| Contact Person & Address for submission of Bids | The Registrar Indian Institute of Technology Kharagpur, West Bengal- 721302 |
| Contact Phone Number (s): E-mail Address: | 032222-82022/24/82163 registrar@iitkharagpur.ac.in |
| Website: | https://www.iitkharagpur.ac.in |



1.0 Introduction and Disclaimers

1.1 Purpose of Tender

The purpose of tender is selection of **Tax Consultant Firm (both Direct and Indirect taxes) at IIT Kharagpur for a period of 1 (one) year.**

1.2 Contract Period

Initially for the period of 1 (one) year. However, same may be renewed further period of 2 (two) years, subject to satisfactory performance of each year with the same terms & conditions.

1.3 Information Provided

The Tender document contains statements derived from information that is believed to be relevant at the date but does not purport to provide all of the information that may be necessary or desirable to enable an intending contracting party to determine whether or not to enter into a contract or arrangement with IIT Kharagpur. Neither IIT Kharagpur nor any of its employees, agents, contractors, or advisors gives any representation or warranty, express or implied, as to the accuracy or completeness of any information or statement given or made in this document. Neither IIT Kharagpur nor any of its employees, agents, contractors, or advisors has carried out or will carry out an independent audit or verification exercise in relation to the contents of any part of the document.

1.4 Costs to be borne by Respondents

All costs and expenses incurred by Respondents in any way associated with the development, preparation, and submission of responses, including but not limited to the attendance at meetings, discussions, demonstrations, etc. and providing any additional information required by IIT Kharagpur, will be borne entirely and exclusively by the Respondent.

1.5 No Legal Relationship

No binding legal relationship will exist between any of the Respondents and IIT Kharagpur until execution of a contractual agreement.

1.6 Respondent Obligation to Inform Itself

The Respondent must conduct its own investigation and analysis regarding any information contained in the tender document and the meaning and impact of that information.



1.7 Evaluation of Offers

Each respondent acknowledges and accepts that IIT Kharagpur may in its absolute discretion apply selection criteria specified in the document for evaluation of proposals for short listing / selecting the eligible consultant. The tender document will not form part of any contract or arrangement, which may result from the issue of this document or any investigation or review, carried out by a Recipient.

1.8 Maintaining Secrecy and Confidentiality

The respondent shall be liable to maintain secrecy and confidentiality of all the information / data / operations, etc. of IIT Kharagpur.

1.9 Acceptance of Terms

A Respondent will, by responding to IIT Kharagpur for tender, be deemed to have accepted the terms of this Introduction and Disclaimer.

The Bidding Firm is required to submit the details of its proposal in **three (3) sealed envelopes**.

The **first envelope** should be super-scribed “**Selection Criteria for Engagement of Tax Consultant Firm (Direct and Indirect taxes) at IIT Kharagpur for a period of 1 (one) year**” and should contain the particulars of compliance with eligibility criteria for short listing as given above, in the format given at **Annexure I**.

The **second envelope** super-scribed “**Technical Evaluation for Engagement of Tax Consultant Firm (Direct and Indirect taxes) at IIT Kharagpur for a period of 1 (one) year**” should contain detailed statement giving the various technical particulars of the proposal covering aspects of the firm like name and location, year of establishment, names of its partners, staff, their qualification / experience, registration number of the firm, and all other such relevant particulars in the format given in **Annexure II (Format-A,B,C,D,E & F)**.

The **third envelope** super-scribed “**Financial Bid - Engagement of Tax Consultant Firm (Direct and Indirect taxes) at IIT Kharagpur for a period of 1 (one) year**” should contain the details of the financial bid of the proposal exclusive of taxes in the format given in **Annexure III**.

All the above mentioned **three** sealed envelopes should then be put in a large sealed envelope and super-scribed “**Engagement of Tax Consultant Firm (Direct and Indirect taxes) at IIT Kharagpur for a period of 1 (one) year**” and submitted to the office of the Registrar, Indian



Institute of Technology Kharagpur, on or before 15.00 hrs on **9th, November 2023**, at the following address:

The Registrar
Indian Institute of Technology Kharagpur
Kharagpur, West Bengal- 721302

1.9.1 Signing of Documents

The person(s) signing the bid documents shall preferably have sealed and signed all pages of the bid. The bid shall contain no erasures or overwriting except as necessary to correct errors made by the bidder, in which case corrections shall be initiated by the person(s) signing the bid.

1.9.2 Validity Period of Tender

90 days from the date of opening of bid.

1.9.3 One Bid per bidder

Each bidder shall submit only one bid for a single assignment.

1.9.4 Late Bids

Any bid received after the deadline for submission of the bids will be treated as "Late Bid" and such late bids shall not be considered at all for competitive bidding

1.9.5 Notification

IIT Kharagpur will notify all short-listed Respondents in writing through email as soon as practicable about the outcome of their tender. Tenderer is not obliged to provide any reasons for any such acceptance or rejection.

1.9.6 Disqualification

Any form of canvassing / lobbying / influence / query regarding short listing, status, etc will be a disqualification.

2.0 Scope of Work:

IIT Kharagpur intends to engage a tax consultant having vast experience in handling various direct taxation including international taxation, indirect taxation, issues arising from time to time regarding Indian taxation for a period of three years. The Consultant shall provide



consultancy services as per the scope of work indicated below (the list is indicative and not exhaustive):

2.1 Regular Tax services

2.1. A-Direct Taxation:

- (i) To advise/give written opinion relating to Income Tax.
- (ii) To keep aware and compute advance tax/self-assessment tax/any other tax liability.
- (iii) Filing of Income Tax Return along with various disclosures / computation notes and all other matters that may be relevant with respect to the filing of the Income Tax Return of IIT Kharagpur as per the Income Tax Act or any other law in force for income tax.
- (iv) Preparation/ checking / scrutinizing and filling quarterly TDS Returns, (including revised return(s) applicable to the Institute on regular basis.
- (v) To prepare replies/submissions for assessment proceedings, appellate proceedings and any other income tax related proceedings/notices/letters/summons etc.
- (vi) Appearing before the appropriate Authority in connection with all assessment proceedings initiated by appropriate authorities including drafting /filing of replies and submissions, representation before the tax authorities for assessment proceedings, drafting/filing of submissions with tax authorities regarding rectification applications including any penalty proceedings as applicable, drafting/filing the submissions for stay of any demand, review of orders etc.
- (vii) To examine any order/communication received from Income Tax Department and advice further course of action.
- (viii) To arrange for any Income Tax Clearance/Exemption Certificate, as and when required
- (ix) Advising IIT Kharagpur for further course of action consequent to assessment/reassessment/rectification orders issued by the Income Tax Authorities, filing of appeals before CIT (Appeals) including drafting of Grounds of Appeal and Statement of Facts, filing of written submissions/ paper book and representation in all existing/new appeal proceedings before CIT (Appeals), representing REC in various Statutory Authorities and representing IIT Kharagpur in pending ITAT cases.
- (x) Pursuing, assisting and coordinating with Income Tax Authorities for timely getting the refunds due to IIT Kharagpur.
- (xi) To assist the appointed advocate/representative in appeal matters before ITAT/HC/SC.



- (xii) To provide consultancy services in any other work related to Income Tax.

2.1. B-International Taxation:

- (i) Advice regarding applicability along with rate of TDS for foreign remittance to non-residents, foreign national etc
- (ii) Filling of TDS return for stated purpose
- (iii) Preparation and issue of Form 15CB certificate wherever necessary and filling of Form 15CA.
- (iv) Appearing before the appropriate Authority in connection with all assessment proceedings initiated by appropriate authorities including drafting /filing of replies and submissions, representation before the tax authorities for assessment proceedings, drafting/filing of submissions with tax authorities regarding rectification applications including any penalty proceedings as applicable, drafting/filing the submissions for stay of any demand, review of orders etc.
- (v) Advising IIT Kharagpur for further course of action consequent to assessment/reassessment/rectification orders issued by the Income Tax Authorities, filing of appeals before CIT (Appeals) including drafting of Grounds of Appeal and Statement of Facts, filing of written submissions/ paper book and representation in all existing/new appeal proceedings before CIT (Appeals), representing REC in various Statutory Authorities and representing IIT Kharagpur in pending ITAT cases.
- (vi) FEMA Compliance, as and when required.
- (vii) To provide consultancy services in any other work related to International Taxation.

2.1. C-Indirect Taxation

- (i) Preparation/ checking / scrutinizing returns before filing and scrutiny of the return with monthly Tax remittances made by IIT Kharagpur during the respective half year.
- (ii) Verification of monthly GST remittance as well as input credit Eligibility under Direct Charge as well as Reverse Charge of each Area and report the adequacy or otherwise in respect of provisions relating to GST and consolidated GST remittances made at Head Office.
- (iii) Advising on issues related to GST including availing of input credit, withholding tax and any other Tax related issues, including queries on tax matters, as referred to by the IIT Kharagpur.
- (iv) Preparation/ checking / scrutinizing and filling of monthly Returns (including Revised Returns) and scrutiny of Input Tax Credit claim of each Area.



- (v) Advising / updating the IIT Kharagpur on compliance requirements under indirect tax laws applicable to IIT Kharagpur on regular basis, filing of appeals, refund claims, etc., attending to assessments / appeals before appropriate authorities/appellate authorities. Regular follow up with the Tax Authorities for tax related matters including refunds
- (vi) Assisting IIT Kharagpur in classification issues and determining the rate of tax under the GST laws, Custom Law and other Indirect Tax laws as and when required.
- (vii) Drafting replies to Demand cum Show Cause Notices/Notices and other communications received from the Commercial Taxes authorities / Custom Authorities or any other Indirect Taxation Authorities.
- (viii) To inform the latest Amendments/Circulars issued from time to time by Government with respect to GST / Custom/raising GST Invoice/e- way bill etc. and any other authorities.
- (ix) To attend before the Commercial Taxes authorities / Central Excise authorities / GST authorities at various levels up to assessing authority level on the GST/Professional Tax/Central Excise /Custom. The further Appeal level appearances are chargeable at mutually agreed fee.
- (x) Advising on maintenance of records and required documentation for proper compliance under various Indirect Tax Acts/Rules/Laws General advisory services related to GST etc.
- (xi) Review of Assessments/Appellate Orders pertaining to various Indirect Tax issues and suggesting subsequent actions thereon.
- (xii) To provide consultancy services in any other work related to Indirect Taxation.

2.2 Mandatory Deployment of Professionals at IIT Kharagpur as per Scope of Work:

The firm needs to mandatorily deploy professionals in the following manner to execute and complete the scope of work during the contract period in time bound manner:

| Sl. No. | Professional dealing with Tax matters | Minimum Man-days/month |
|---------|---------------------------------------|---|
| 1 | Partner | 1 (one) Partner, 2 (two) days in a month (fortnightly) |
| 2 | 2 Qualified CA/CMA | 2 (Two) Qualified CA/CMA, 4 (four) days in a month |
| 3 | 4 Semi-Qualified Assistants | 4 (Four) Semi-Qualified Assistants, 7 (seven) days in a month |



3.0 General Terms and Conditions

The selection will be on the basis of eligibility criteria, past experience, credentials and suitability.

The Engagement shall initially for a period of 1 (one) year and same may be extended for a further period of 2 years' subject to the yearly satisfactory performance.

3.1 Earnest Money Deposit

- (i) EMD of ₹20,000/- (Rupees Twenty Thousand Only) in the form of demand draft in favour of Indian Institute of Technology Kharagpur, payable at Kharagpur, to be submitted along with Technical Bid. Without EMD, tender will not be accepted. IIT Kharagpur will give exemption for submission of EMD who are registered with MSME, NSIC or start-ups as recognised by DIPP for the tendered item/services. However proper and valid documents in this regard must be submitted by the bidders in support of their claim
- (ii) EMD of the bidder will be forfeited if:
 - (a) after opening of the tender, the bidder revokes tender within the validity period or modifies bid.
- (iii) EMD will be refunded to unsuccessful bidders.
- (iv) EMD shall not carry any interest.

3.2 Performance Guarantee

- (i) The EMD of successful bidder will be converted into Performance Guarantee.
- (ii) The quantum of Performance Guarantee will be equivalent to one month's fee or EMD amount, whichever is higher.
- (iii) If EMD falls short of PG amount, then shortfall amount will be retained from first quarter payment or the bidder may submit in the form of Bank Guarantee, Insurance Surety Bonds, Account Payee Demand Draft, Fixed Deposit Receipt from a commercial bank.

3.3 Selection Criteria:

3.3 (a) Eligibility Criteria

1. The Chartered Accountants/Cost Accountants Firm should be engaged in providing services under Direct and Indirect tax laws.
2. The firm should be in **operation for at least 15 years** after its Registration.
3. The Firm should have **Head Office/Branch Office in Kolkata, West Bengal**.



4. Bidder shall demonstrate their existence in the **tax consultancy services for at-least 10 years or more.**
5. Bidder shall demonstrate similar **experience of rendering tax consultancy services in any of the last five (5) years in PSU/Government Organization having Annual Revenue/ Turnover of more than ₹500 crore or more.**
6. Bidder shall demonstrate similar experience of **rendering tax consultancy services in Central Funded Educational Institutes of National Importance like IIT/NIT/IIM/IISER/NISER and Central/State Universities during last five (5) years.**
7. Bidders should have minimum **15 partners** with at least 5 partners dealing in tax matters, **5 qualified assistants** of which 2 should be handling tax matters.
8. Bidders should have **gross receipt ₹100 lakh or more for each of the last 3 financial years prior to the date of making applications.**
9. Bidder should have **experience of at-least 5 cases in dealing with all proceedings before any relevant Tribunal Level.**
10. The applicant **should not have been black listed/debarred/ disqualified** by any regulatory/ statutory body or Government entity or any International/National agency for corrupt or fraudulent practices. A declaration as per Annexure IV is to be submitted along with the tender.

3.3 (b) Selection Process

This proposal will be assessed on the following Selection process: -

Invited tender wherein eligibility, Technical and Financial bids are submitted in separate envelopes. Selection in three phases consisting of -

Phase 1 - Pre-Qualification based on Eligibility criteria

Phase 2 - Technical Evaluation

Phase 3 - Financial Evaluation

Technical Evaluation

After the expiry of last date for submission of bids, in the first instance the first envelope containing the compliance with the "Eligibility Criteria" would be opened in respect of all the bidders to verify the compliance of the bidders with the prescribed eligibility requirements. The second envelope containing technical particulars would be opened only in respect of those firms who satisfy the selection criteria. Thereafter technical evaluation of the eligible bidders would be undertaken.



- a. The Technical bid will be evaluated by an in-house Committee constituted by IIT Kharagpur. The list of technically qualified bidders would be short listed. Technical Capability of the bidders would be evaluated based on the following criteria and weight age:-

| Sl. No. | Criteria | Maximum Marks | Scores based on achievement | |
|---------|--|-------------------------------------|-----------------------------|-------|
| | | | Criteria | Score |
| 1 | Year of establishment of Firm(s)/ Date of registration. | 5 | =15 | 2 |
| | | | >15 ≤20 | 3 |
| | | | >20 | 5 |
| 2 | Firm should have Head Office/Branch Office in Kolkata, West Bengal | 5 | H.O. | 5 |
| | | | Branch | 2 |
| 3 | Number of partners in the Firm. | 15 | =15 | 7.5 |
| | | | >15 ≤20 | 10 |
| | | | >20 | 15 |
| 4 | Number of qualified CA/CMA on the payroll of the Firm. They should be a member of the ICAI/ICMAI. (Partner should not be included here) | 10 | =5 | 2.5 |
| | | | >5 ≤10 | 5 |
| | | | >10 ≤15 | 7.5 |
| | | | >15 | 10 |
| 5 | Gross Receipt of the firm for the last 3 (three) years ending on 31st March, 2023 must be equal to or greater than ₹1 Crore. | 15 | =1 Cr. | 5 |
| | | | >1Cr. ≤5Cr. | 7.5 |
| | | | >5Cr. ≤10Cr. | 10 |
| | | | >10Cr. | 15 |
| 6 | Experience in handling Direct and indirect tax-related matters relating to Public Sector Undertakings, Government Organization with a turnover of ₹500 Crores and above in the last 5 years prior to the date of making application. | 20 | No. of clients | |
| | | | =5 | 5 |
| | | | >5 ≤10 | 10 |
| | | | >15 ≤20 | 15 |
| | | | >20 | 20 |
| 7 | Experience of rendering tax consultancy services in Central Funded Educational Institutes of National Importance like IIT/NIT/IIM/IISER/NISER and Central/State Universities during last five (5) years prior to the date of making application. | National Importance -15 Others-5 | No. of Institutes | |
| | | | =5 | 5 |
| | | | >5 ≤10 | 10 |
| | | | >15 | 15 |
| | | | No. of Other Institutes | |
| | | | =2 | 2 |
| | | | >2 ≤4 | 3 |
| | | | >4 | 5 |
| 8 | Experience in dealing cases with all proceedings before any relevant Tribunal Level | 10 | No. of cases | |
| | | | =5 | 5 |
| | | | >5 ≤10 | 7.5 |
| | | | >10 | 10 |
| | Total | 100 | | |



All bidders scoring more than 60 marks (in Technical Criteria) will be selected as the Technically Qualified Bidder. In case, less than three bidders get more than 60 marks, the top three bidders getting the maximum marks in Technical Capability will be selected as the Technically Qualified Bidder, subject to them getting at least 55 marks.

- b. While IIT Kharagpur would form a panel of Tax consultants from the technically qualified bidders, the technically qualified bidders alone will be informed of the date of opening of the financial bid for Engagement as Tax consultant. **The decision of IIT Kharagpur will be final in this regard.**

Financial Bid Evaluation

- a. The final selection of the successful bidders from the technically qualified bidders will be done by considering both the technical and financial bids using the following criteria and weightage: -

| Sl. No. | Criteria | Maximum Marks (Weightage) | Method of allotting marks for Combined Score |
|---------|--------------|---------------------------|---|
| 01 | Financial | 20 | The bidder with the lowest quote in Financial Bid (Annexure-III) will be awarded 20 marks and other bidders will be awarded proportionately less marks (e.g.) if the lowest quote is ₹60/-, the bidder quoting this price will get 20 marks. A bidder quoting ₹90/- will get $(60/90) \times 20 = 13.33$ marks. |
| 02 | Technical | 80 | The bidder with the maximum technical score will be awarded 80 marks and other bidders will be awarded proportionately less marks (e.g.) if the highest technical score is 84, bidder having this will get 80 marks. Bidder having technical score of 60 will get $[60/84] \times 80 = 57.14$ marks. |
| | Total | 100 | |

- b. All marks will be rounding off up to 2 decimal places. The bidder getting the maximum combined score out of 100 will be selected as the successful bidder.
- c. In case of a tie, preference will be given to the bidder having higher technical scoring.
- d. IIT Kharagpur reserves all rights to accept or reject any or all proposals without assigning any reasons thereof.



3.4 Terms of payment

The payment shall be made against the services provided by firm as per the scope of works, subject to the following terms and conditions:

- (i) The Service Provider will raise the quarterly bills in duplicate to the Institute and acceptance of the same by the Institute.
- (ii) Any increase in tax rates during the contract period will be borne by the Institute.
- (iii) TDS under Income tax/GST, if any, will be deducted at applicable rates.
- (iv) The Institute reserves the right to deduct any amount from the bill as may be considered reasonable for unsatisfactory services or delay in providing of services. The decision of the Institute will be the final in this regard.

3.5 Confidentiality

Tax Consultant shall during the tenure of the Contract and at any time thereafter keep all information relating to the work in full confidence and shall not, unless so authorized in writing by REC, divulge or grant access to any information about the work or its results and shall prevent anyone becoming acquainted with either through Tax consultant or its personnel or agents.

3.6 Government Tax

Bidders are responsible for establishing the status of the Services for the purpose of any government tax including GST, cess etc. to Gol.

3.7 Alterations to Tenders

Any manuscript or other alteration to the bid must be countersigned and dated by the person submitting the tender

3.8 Letters and Declaration to Accompany Tenders

The bid must be accompanied by a letter on firm's letter head showing the full registered name(s) and registered office address of the bidder. It should be signed by a person of suitable authority to commit the bidders to a binding contract.

3.9 Undertaking:

There has not been any disciplinary action initiated or contemplated/suspension of business against the entity by ICAI/ICMAI/RBI or other regulatory /statutory authority during the last five years-



- *None of the partners/employees have been convicted of any offence involving moral turpitude or has been found guilty of any economic offence.*
- *No appeal/unresolved dispute/suit/case/application has been pending at any court in India regarding the existence of the business/ right to carry on practice.*

3.10 Indemnity

The successful bidder shall exercise reasonable skill, care and diligence in the performance of the assignment and indemnify and keep IIT Kharagpur, its officers, directors, employees indemnified in respect of any loss, damage or claim howsoever arising out of or related to breach of contract, statutory duty or negligence by the firm or the its staff, agents or sub-contractors in relation to the performance or otherwise of the Services to be provided under the Contract.

3.11 Assigning to Others

The successful bidder shall not, without the prior written consent of IIT Kharagpur, assign or transfer or cause to be assigned or transferred, whether actually or as the result of takeover, merger or other change of identity or character of the Consultants, any of its rights or obligations under the Contract or any part, share or interest therein. Upon any such assignment or transfer, this engagement may forthwith be terminated by IIT Kharagpur.

3.12 Termination

IIT Kharagpur may, at its sole discretion and at any time terminate the Contract by giving a month's notice, and inform the Consultants of IIT Kharagpur's decision by written instruction to that effect. In the event of the Contract being so terminated, the firm shall take such steps as are necessary to bring the Services to an end, (including terminating any sub-contracts placed by the firm) in a cost effective, timely and orderly manner.



Annexure I
Eligibility Criteria

| Sl. No. | Requirements | Compliance | Details |
|---------|--|------------|---------|
| 1 | Firm should be in operation for at least 15 years after its Registration | Yes/No | |
| 2 | Firm engaged in providing services under direct and indirect tax laws and having a minimum of 10 years' experience in the taxation field | Yes/No | |
| 3 | Should have Head office/branch office in Kolkata/ West Bengal | Yes/No | |
| 4 | Should have minimum 15 CA/CMA qualified partners with at least 5 partners dealing in tax matters, 5 CA/CMA qualified assistants of which 2 should be handling tax matters. | Yes/No | |
| 5 | Should have experience of rendering tax consultancy services in any of the last five years in PSU/Government Organization having Annual Revenue/ Turnover of more than ₹500 crore or more. | Yes/No | |
| 6 | Should have experience of rendering tax consultancy services in Central Funded Educational Institutes of National Importance like IIT/NIT/IIM/IISER/NISER and Central/State Universities during last five (5) years prior to the date of making application. | Yes/No | |
| 7 | Should have gross receipt of ₹1 Crore or more for each of the last 3 financial years prior to the date of making applications. | Yes/No | |
| 8 | Whether EMD is submitted? If the firm pertains to the exempted category as mentioned in clause 3.1 then submit valid self-attested documents. | Yes/No | |

Note: The above is only a format. Information may be submitted in additional sheet.



Annexure II
Technical Evaluation

Format-A

Firm Details

| Sl. No. | Criterion | Firm's Strength & Capacity | |
|---------|---|---|-------------|
| 1. | The firm should be based at West Bengal (Submit supporting document regarding address) | Name of the Firm | |
| | | Address of the Firm | |
| | | Address of Branch at Kolkata | |
| | | Name and address of the Authorized Official | |
| | | Telephone No. | |
| | | Mobile : | |
| | | E-mail : | |
| 2. | The CA/ICMAI firm should have at least 15 partners; | Provide certificates from the ICAI/ICMAI | Fellow - |
| | | | Associate - |



| | | | |
|----|--|---|--|
| 3. | The firm should be in operation for at least 15 years after its Registration | Year of Registration | |
| | | Nos. of years in operation | |
| | | Nos. of years in tax consultancy services | |
| 4. | The Chartered Accountants/Cost Accountants firm should be registered with the Institute of Chartered Accountants of India/ The Institute of Cost Accountants of India. (Provide all registration certificates) | Registration Number | |
| | | PAN of the firm | |
| | | GST Registration No. | |
| 5. | Experience of rendering tax consultancy services in any of the last five (5) years in PSU/Government Organization having Annual Revenue/ Turnover of more than ₹500 crore. | a. Direct and indirect tax-related matters | |
| | | b. Dealt cases in all proceedings before relevant Tribunal Level | |
| | | Total no. of Clients: | |
| 6. | Experience of rendering tax consultancy services in Central funded Educational Institutes of National Importance like IIT/NIT/IIM/IISER/NISER and Central/State Universities during last five (5) years prior to the date of making application. | Centrally Funded Educational Institutes of National Importance like IIT/NIT/IIM/IISER/NISER | |
| | | Central/State Universities | |



भारतीय प्रौद्योगिकी संस्थान खड़गपुर

INDIAN INSTITUTE OF TECHNOLOGY KHARAGPUR

| | | | |
|----|---|-----------------------------------|--|
| 7. | Nature of overall experience and notable achievements/recognitions, if any, in taxation related consultancy field. | | |
| 8. | Gross receipt should have ₹100 lakh or more for each of the last 3 financial years prior to the date of making applications (Provide copies of the Audited Financial Statements for all the 3 Years (Three) years upto 31st March, 2023 along with ITR Acknowledgement) | FY 2020-2021 | |
| | | FY 2021-2022 | |
| | | FY 2022-2023 | |
| 9. | Details of key employees/qualified assistants including their qualification and experience in executing such assignments. | Nos. of qualified assistants | |
| | | Nos. of semi qualified assistants | |

Note: Copy of proof of various empanelment and proof of allocation of Tax Consultancy assignments of the PSU/ Central funded Educational Institutes, and Central/State Universities mentioned above must be attached with the application.

Date:

Place:

Signature of Authorized Signatories of the Firm with
Seal



Format-B

Relevant information about the partners:

| Sl. No. | Name of Partner | Length of Association with Firm in years | ACA/ACMA Year and No. | FCA/FCMA Year and No. | Relevant Experience | Remarks |
|---------|-----------------|--|-----------------------|-----------------------|---------------------|---------|
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Any other relevant information about the partners.

Date:

Place:

Signature of Authorized Signatories of the Firm
with Seal



Format-C

Details of past assignments on Tax consultancy provided in previous 5 years to PSU/Government Organization having Annual Revenue/ Turnover of more than ₹500 crore.

| Sl. No. | Client Name | Period of Tax Consultancy | | Work related to | |
|---------|-------------|---------------------------|----|-----------------|--------|
| | | From | To | Taxation | Others |
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Date:

Place:

Signature of Authorized Signatories of the Firm
with Seal



Format-D

Details of past assignments on Tax consultancy provided in previous 5 years to Central Funded Educational Institutes of National Importance like IIT/NIT/IIM/IISER/NISER and Central/State Universities.

| Sl. No. | Client Name | Period of Tax Consultancy | | Work related to | |
|---------|-------------|---------------------------|----|-----------------|--------|
| | | From | To | Taxation | Others |
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Date:

Place:

Signature of Authorized Signatories of the Firm
with Seal



Format-E

Details of Qualified Staff (CA/CMA) & Semi – Qualified Staff

(Please provide a self-attested copy of Certified of ICAI / ICMAI for each qualified staff)

| Sl. No. | Name of Staff | Length of Association with Firm (in years) | Educational Qualification | Area of Key Expertise | Membership No. | Relevant Experience |
|-----------------------------------|---------------|--|---------------------------|-----------------------|----------------|---------------------|
| Details of Qualified Staff | | | | | | |
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| Details of Semi – Qualified Staff | | | | | | |
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Note: Partner/s name should not be included in qualified staff details.

Date:

Place:

Signature of Authorized Signatories of the
Firm with Seal



Format-F

Details of Experience in dealing cases with all proceedings before any relevant Tribunal Level

| Sl. No. | Name of Client | Direct/ Indirect Tax | Name of Tribunal & Level | Remarks, if any |
|---------|----------------|-------------------------|--------------------------------|--------------------|
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Note: Please enclosed supporting documents like Representation Letter from client etc.

Date:

Place:

Signature of Authorized Signatories of the
Firm with Seal



Annexure III

Financial Bid

| | |
|-----------------------|--|
| Name of the Services: | Engagement of Tax Consultant at IIT Kharagpur for a period of 1 (one) year |
| Tender Number: | IIT/ KHARAGPUR/F&A/TAX CONSULTANT/2023-2024/01 |
| Tender Dated: | 19-10-2023 |
| Name of the Bidder: | |

| Particulars | Amount (₹) |
|--|------------|
| Lump-sum annual fee for rendering consultancy services in relation to the direct and indirect taxation for Scope of Work as mentioned in the tender document | |
| Total Fees (₹) | |
| Total Fees (₹) in words: | |

- The quoted fee should be inclusive all out-of-pocket expenses and any other incidental expenses.
- The quoted fee should be **exclusive of taxes**. Tax shall be borne by IIT Kharagpur as applicable.
- Bidders are required to quote financial proposal / fee structure strictly as sought above.

We, undertake that the rates quoted above by us will not change during the contract period and accept the payment schedule as described in the appropriate column.

Date:

Place:

Signature of Authorized Signatories of the
Firm with Seal



Annexure IV

**DECLARATION REGARDING DISCIPLINARY ACTION/BLACKLISTING/DEBARRING F O R
TAKING PART IN TENDER.**

(To be executed & attested by Public Notary/Executive Magistrate on ₹10/- or higher non judicial Stamp paper by Tenderer)

I / We(Tenderer) hereby declare that no disciplinary action has been initiated or contemplated/ suspension of business against the firm by ICAI/ ICMAI/ Income Tax Authority or any other Government Authority during the last five years.

I / We(Tenderer) hereby declare that none of the partners/ employees have been convicted of any offence involving moral turpitude or has been found guilty of any economic offence.

I / We(Tenderer) hereby declare that no appeal/ unresolved dispute/ suit/ case/ application has been pending at any court in India regarding the existence of business/right to carry on practice.

In case the above information found false, I/We are fully aware that the tender/ contract will be rejected/cancelled by the Indian Institute of Technology Kharagpur, and EMD/ shall be forfeited.

In addition to the above, the IIT Kharagpur will not be responsible to pay the bills for any completed /partially completed work.

Deponent:

Attested:

Date:

Place:

Signature of Authorized Signatories of the
Firm with Seal



Declaration of Confidentiality

Subject to conditions contained in this tender document, Firm shall take all necessary steps to safeguard the privacy and confidentiality of any information about IIT Kharagpur during the period of contract and shall use its best endeavors to secure that:

- a) No person acting on behalf of Firm divulges or uses any such information except as may be necessary in the course of providing services to IIT Kharagpur;
- b) No person seeks such information other than that is necessary for the purpose of tax advisory works as specified in the tender document; and
- c) The Firm shall bind its employees to terms of confidentiality clause and shall take all action reasonably necessary to secure the confidentiality of such information against theft, loss or unauthorized disclosure.

This clause shall survive till the termination or expiry of the assignment as Tax Consultant of IIT Kharagpur.

Date:

Place:

Signature of Authorized Signatories of the
Firm with Seal



Declaration

(To be furnished in the letter head of the firm / company)

We hereby declare that the information submitted with regard to the subject tender is complete in all respect and true to the best of our knowledge. We understand that in case any discrepancy or inconsistency or incompleteness is found in the information submitted by us, our application is liable to be rejected.

Date:

Place:

Signature of Authorized Signatories of the
Firm with Seal