

**GOVERNMENT OF INDIA
MINISTRY OF COMMUNICATIONS
DEPARTMENT OF POSTS
(Directorate of Postal Life Insurance)
Chanakyapuri, New Delhi-110021**

**Request For Proposal (RFP) for Engagement
of
Chartered Accountant cum Goods and Services
Tax Consultant**

23rd April 2025

Disclaimer

The information contained in this Request for Proposal (RFP) document or subsequently provided to bidders, whether verbally or in documentary or any other form by or on behalf of Department of Posts, India, is provided to bidders on the terms and conditions set out in this RFP and such other terms and conditions subject to which such information is provided.

This RFP is not an agreement and is neither an offer nor invitation by Department of Posts to the prospective bidders or any other person. The purpose of this RFP is to provide interested parties with information that may be useful to them in the formulation of their Proposals pursuant to this RFP.

Information provided in this RFP to the bidders is on a wide range of matters, some of which depends upon interpretation of law. The information given is not an exhaustive account of statutory requirements and should not be regarded as a complete or authoritative statement of law. The Authority accepts no responsibility for the accuracy or otherwise for any interpretation or opinion on the law expressed herein.

Department of Posts also accepts no liability of any nature whether resulting from negligence or otherwise however caused arising from reliance of any applicant upon the statements contained in this RFP.

Department of Posts may in its absolute discretion, but without being under any obligation to do so, update, amend or supplement the information, assessment or assumption contained in this RFP.

The issue of this RFP does not imply that Department of Posts is bound to select a bidder or to appoint the selected bidder, as the case may be, as full time CA cum GST Consultant and Department of Posts reserves the right to reject all or any of the proposals with assigned reason(s).

The bidders shall bear all its costs associated with or relating to the preparation and submission of its Proposal including but not limited to preparation, copying, postage, delivery fees, expenses associated with any demonstrations or presentations which may be required by Department of Posts or any other costs incurred in connection with or relating to its Proposal. All such costs and expenses will remain with the bidder and Department of Posts shall not be liable in any manner whatsoever for the same or for any other costs or other expenses incurred by a bidder in preparation or submission of the Proposal, regardless of the conduct or outcome of the selection process.

Department of Posts
(Directorate of Postal Life Insurance)
Chanakyapuri, New Delhi-110021

F.No: 65-03/2024-LI

Dated: 23.04.2025

Invitation of Offer for engagement of Chartered Accountant cum Goods and Services Tax Consultant in Directorate of Postal Life Insurance

The Chief General Manager (CGM), Directorate of Postal Life Insurance (PLI), Chanakyapuri, New Delhi-110021 invites offer from interested and qualified Members of the Institute of Chartered Accountants of India (ICAI) for engagement of a CA cum GST Consultant in Directorate of Postal Life Insurance for a period of two years initially and extendable for a period upto one (1) year, in the prescribed application form. The CA cum GST Consultant will be required to provide professional services to the Directorate of Postal Life Insurance on various matters concerning GST on the operations of the Postal Life Insurance business and accounting related matters of Directorate of Postal Life Insurance. The detailed scope of work is given in Section 4 of this RFP. The tender document, along with terms and conditions, has been uploaded on www.eprocure.gov.in. The bidders can log on to the website and obtain the tender document.

2. Interested qualified CA's, who are desirous of participating in e-procurement, shall submit their bids in the standard formats prescribed in the Tender documents available at www.eprocure.gov.in. The bidders should upload the scanned copies of all relevant certificates, documents etc. on www.eprocure.gov.in in support of their bids. The bidder should sign on all statements, documents, etc. uploaded by her / him, owning responsibility for their correctness/authenticity. Bid documents can also be downloaded from www.indiapost.gov.in. Along with the bid, the bidder has to submit a pre - bid Integrity Pact as prescribed by the Government of India. Bid uploaded without Integrity Pact shall not be considered.

3. Schedule of Tender:

	23.04.2025
Last Date of submission of queries by bidders on the RFP document via e-mail (queries to be sent on the email id- aa01plidte@gmail.com , aa01.plidte@indiapost.gov.in , aa02.plidte@indiapost.gov.in with copy to gmfinance.plidte@indiapost.gov.in & cgm_pli@indiapost.gov.in)	01.05.2025
Last Date and Time of submission of RFP	22.05.2025 by 1100 hours
Date and Time of opening of Technical bid	23.05.2025 at 1100 hours
Date and time of opening of Financial bid for the eligible applicants	Date will be notified to technically qualified bidders
Contact person for clarifications on RFP	Sh. S.Laskar, Sr AO Mobile : 8017189045 Email address: aa01.plidte@indiapost.gov.in

Chief General Manager
Directorate of Postal Life Insurance
Chanakyapuri Post Office Complex, New Delhi - 110021

Government of India
Ministry of Communications
Department of Posts
(Directorate of Postal Life Insurance)
Chanakyapuri, New Delhi-110021

F.No: 65-03/2024-LI

Dated: 23.04.2025

Request for Proposal (RFP) for engagement of Chartered Accountant cum Goods and Services Tax Consultant

1. Letter of Invitation:

1.1 You are invited on behalf of President of India to participate in the process of selection for engagement of CA cum GST Consultant for providing consultancy services. The CA cum GST Consultant shall be required to provide professional services to the Directorate of Postal Life Insurance on various matters pertaining to GST concerning the operation of the Postal Life Insurance business along with professional help in accounting related matters of Directorate of Postal Life Insurance. Description of duties is detailed in Section 4 of the RFP document.

2. Information on proposal:

2.1 The Directorate of Postal Life Insurance, located in Delhi is a key vertical within India Post, responsible for managing and overseeing the country's postal life insurance services. Established to provide affordable insurance products to the rural and urban population, it plays a significant role in promoting financial inclusion. The Directorate is involved in policy formulation, product development, and ensuring the effective delivery of insurance services through the postal network. By leveraging the extensive reach of India Post, the Postal Life Insurance Directorate aims to provide reliable and accessible insurance solutions to all sections of society.

2.2 The Directorate of Postal Life Insurance requires to hire the services of a qualified and experienced Chartered Accountant for providing consultancy on Accounting and Goods & Services (GST) related matters pertaining to its operations so as to ensure that all its services remain GST compliant and GST related matters pertaining to the Directorate and its field operations are professionally handled.

3. Instructions to bidders

3.1 The tender document, along with terms and conditions, has been uploaded on www.eprocure.gov.in. The bidders can log on to the website and see the tender document.

3.2. The bidders who are desirous of participating in e-procurement shall submit their bids in the standard formats prescribed in the tender documents available on www.eprocure.gov.in. The bidders should upload the scanned copies of all relevant certificates, documents etc. on www.eprocure.gov.in in support of their bids. The bidder should sign on all statements, documents, etc. uploaded by him, owning responsibility for their correctness/authenticity. The prices in any form or by any reasons should not be disclosed in the technical or other parts of the bid except in the commercial bid. Failure to do so will make the bid liable to be rejected.

3.3 As per the directives of Department of Expenditure, Ministry of Finance, Government of India, this tender document has been published on Central Public Procurement Portal (URL: <http://eprocure.gov.in>). **The bidders are required to submit their bids electronically on the CPP Portal only, using valid Digital Signature Certificates (DSC).** More information useful for submitting online bids on the CPP Portal may be obtained at: <http://eprocure.gov.in/eprocure/app> .

3.4 Bidders are required to enrol on the e-procurement module of the CPP Portal (URL: <http://eprocure.gov.in/eprocure/app>) by clicking on the link “Click here to Enrol”. Enrolment on the CPP Portal is free of charge.

3.5. As part of the enrolment process, the bidders will be required to choose a unique username and assign a password for their accounts.

3.6. Bidders are advised to register their valid email address and mobile numbers as part of the registration process. These would be used for any communication from the CPP Portal.

3.7. Upon enrolment, the bidders will be required to register their valid Digital Signature Certificate (Class III Certificates with signing key usage) issued by any Certifying Authority recognized by CCA India, with their profile.

3.8. Only one valid DSC should be registered by a bidder. Please note that the bidders are responsible to ensure that they do not lend their DSCs to others which may lead to misuse.

3.9 Bidder will then log in to the site through the secured log-in by entering their user ID/password and the password of the DSC.

4. Description of duties of the Chartered Accountant cum Goods and Services Tax Consultant in Directorate of Postal Life Insurance:

A. Basic Responsibilities:

- i. Comply with registration requirements of Directorate of Postal Life Insurance under GST Law & Guidelines and assist in obtaining/ surrendering registration, wherever required.
- ii. Advising the records / reports to be maintained by the Directorate of Postal Life Insurance for GST compliance and assist in preparation and maintenance of all books of accounts as required under GST laws for GST compliance and providing their reconciliation with returns on monthly as well as consolidated for the full year basis.
- iii. Filing GST returns of Directorate of Postal Life Insurance as and when required as per provisions of the GST Act.
- iv. To work in tandem with Technology Division Directorate of Postal Life Insurance, inter-alia, to :-
 - a. Examine the GST functionalities available in existing / future software platforms / applications of the Directorate of Postal Life Insurance and to provide guidance / assistance to Information Technology team of the Directorate of Postal Life Insurance for necessary developments / changes in these platforms for proper compliance of GST provisions and assist in

automation of entire process of GST collection, discharge and compliance.

- b. To continuously review, advise amendments / developments in the software platforms / applications, tax determination platform or any other software being used by the Bank for ensuring compliance with GST and Input Tax Credit provisions.
- c. To assist in preparation of BRD pertaining to GST related requirements & to validate UAT of the developed IT systems and to work in coordination with Directorate of Postal Life Insurance team for carrying out functional testing (as and when required) of the software.
- v. The selected CA cum GST Consultant who is well versed with Accounting and GST matters, is to be physically present in Directorate of Postal Life Insurance on 3 working days every week and as and when required in case of any exigencies. The CA must be proficient in using MS Excel. The deputed CA will have to follow the working hours / working days of the Directorate of Postal Life Insurance and will have to make their own travelling arrangements. He / she may also be required to attend office on weekend/holidays in case of exigencies of work. Appropriate space for seating and other requisite working infrastructure would be provided to the CA cum GST Consultant in office premises by the Directorate of Postal Life Insurance. The successful bidder has to ensure that he / she would be available for the above mentioned duration to the Directorate of Postal Life Insurance so that the work of the Directorate of Postal Life Insurance is completed smoothly within the stipulated timelines.
- vi. Attend review meeting whenever required for discussions and improving the efficiency of work and compliance of Directorate of Postal Life Insurance under GST laws.
- vii. To assist the Directorate of Postal Life Insurance in responding the queries related to GST/Service Tax matters of statutory/concurrent auditors/ internal management of the Directorate of Postal Life Insurance.
- viii. Creation of training material, presentation for the use of Directorate of Postal Life Insurance's and field staff as and when required.
- ix. Ensure correct ascertainment and payment of tax liabilities.
- x. Any additional work due to introduction/ amendment in GST Law / Guidelines from time to time or due to any requirement of information/data by the GST Department.
- xi. Provide opinions / comments / clarifications sought on various GST issues raised by various departments of Head Office / Branches / Offices and other units of the Directorate of Postal Life Insurance;
- xii. Review and correction of various circulars and instructions/ guidelines to be issued to the field functionaries/ other offices by Head Office in respect of GST related matters.

B. Advisory services: Accounting and Goods and Services Tax Laws

- i. Notify the Directorate of Postal Life Insurance about any change/ updation/ amendments in the GST Act and Rules prescribed through Circulars / Notification or any other guidelines issued by Government of India or its agencies and also advise their implications on the Directorate of Postal Life Insurance including guidance on implementation including IT System and its accounting on regular basis and on suo-moto basis.
- ii. Prepare and submit a detailed report comparing the current state (AS –Is) to the desired state (To-Be) based on the best industry practices.

- iii. Design streamlined GST processes tailored to Department of Post requirements. Develop clear guidelines, workflows and documentation standards and integrate best practices identified through benchmarking.
- iv. Rendering professional advice in connection with accounting related matters and Insurance Regulatory and Development Authority of India Accounting Regulations.
- v. The Consultant will coordinate with the Consulting Actuary engaged by the Directorate of Postal Life Insurance and suggest ways and means to make the Postal Life Insurance & Rural Postal Life Insurance financial statements compliant with the regulations of Insurance Regulatory and Development Authority of India (IRDAI) to the extent possible. He/ She will also advise the Management on any accounting related issues which may require his / her expertise.

5. Pre-Qualification (PQ) Criteria:

Pre-requisites for the selection as Chartered Accountant cum Goods and Services Tax Consultant are as under:

- (i) She / he should be a citizen of India. **(Any valid proof of residence to be uploaded on CPP portal).**
- (ii) She / he should be based / headquartered in Delhi / National Capital Region (NCR). Bidders who are based/ headquartered in other parts of the country may also apply subject to the condition that she/ he should be based/ headquartered in Delhi / National Capital Region (NCR), after selection. **(Self - declaration to be uploaded by the Bidder on CPP portal).**
- (iii) She / he should be a fellow member of the Institute of Chartered Accountants of India (ICAI) on the date of submission of the bid document. **(Certificate from ICAI to be uploaded on CPP portal along with the bid).**
- (iv) She / he should not have committed breach of professional conduct. **(A Certificate to this effect issued by the Institute of Chartered Accountants of India / previous employer / or self-declaration to be uploaded on CPP portal).**
- (v) No disciplinary action by the Institute of Chartered Accountants of India or any other accounting professional body or a case in any Court of Law should be pending against her / him on the date of submission of the bid document. He/she should not have been blacklisted by any Central or State Government Organization **(Self-declaration or certificate from Institute of Chartered Accountants of India to be uploaded on CPP portal along with the bid).**
- (vi) She / he should not be over the age of forty -five (45) years on the date of submission of the bid document. **(Date of Birth Certificate proof issued by Government or birth certificate copy to be uploaded on CPP Portal).**
- (vii) She / he should possess a valid Certificate of Practice (CoP) issued by the Institute of Chartered Accountants of India **(Certificate from ICAI to this effect should be uploaded on the CPP portal).**

6. Experience eligibility:

- (i) Minimum of 7 years work experience as a Chartered Accountant in India.
- (ii) A minimum work experience of 2 years in handling accounting related matters of

Organization in Insurance/financial sector in India. Details of working assignments in chronological order to be submitted along with documentary proofs of the same.

(iii) Should possess adequate knowledge of GST Act and working experience of a minimum of 3 years in consultancy to organizations in GST related matters. Documentary proof supporting experience to be submitted including assignments undertaken concerning GST matters, trainings completed on GST matters.

(iv) Should have provided GST consultancy to a minimum of 2 Organizations in last 2 financial years. Documentary proof in the form of work orders, organization credential to be submitted.

(v) Only an **Individual Chartered Accountant** (and **NOT A CA OR CONSULTING FIRM**) is eligible to participate in the bid.

(vi) Necessary Documents confirming all past and present occupied positions should be uploaded on CPP Portal along with bid.

7. **Receipt of Offer:** The offer (RFP document) should be uploaded on CPP portal within the prescribed date and time (**22.05.2025 by 1100 hours**).

8. **Evaluation Process:** The process of evaluation of bids received on CPP Portal will be done in three stages:

8.1 Pre-Qualification (PQ) Evaluation:

8.1.1 All the proposals will be evaluated to assess their eligibility based on the pre-qualification criteria as specified in **Clause 5** of this RFP document (as per format given in **Annexure II**).

8.1.2 The offers not meeting any of the pre-qualification criteria will be summarily rejected.

8.2 Technical Bid Evaluation:

Technical Bid evaluation of all bidders meeting the pre-qualification criteria will be done as mentioned below:

8.2.1 All the eligible offers will be evaluated by the Tender Evaluation Committee (TEC) based on the Eligibility criteria as per **clause 6** of this RFP document as per the scoring criteria given in Clause 8.5. The bidders would also have to make a presentation before the TEC comprising aspects as mentioned in Clause 8.5. GST Consultancy case study to be presented by the Consultant should be of an actual case dealt by him / her.

8.2.2 Applicants (bidders) obtaining a total score of **60 marks or more (out of a total of 100)** would be declared technically qualified.

8.3 Financial Bid Evaluation:

8.3.1 Financial bids of technically qualified applicants will be opened at a date and time, which will be intimated to bidders.

8.3.2 The financial bid shall be filled by the bidder as per the format given in Annexure IV of the RFP document.

8.3.3 The financial bids will be evaluated by the Tender Evaluation Committee constituted for the purpose.

8.4 Miscellaneous

8.4.1 Technical bid and financial bid should be uploaded separately by the bidder on the CPP portal.

8.4.2 The final selection of bidder will be done as per criteria given in **Clause 8.6** of the RFP document.

8.4.3 If any information provided by any Bidder is found and/or proved to be incorrect or misleading, such bid shall be rejected/ disqualified. Such bidder may also be blacklisted for all future tenders by the Directorate of Postal Life Insurance.

8.5 Technical bid Scoring Criteria:

Sl No.	Evaluation criteria	Maximum Marks allotted
(i)	Experience of work as a Chartered Accountant	20
	7 - 10 years >10-15 years >15 years	10 15 20
(ii)	Experience in handling accounting related matters of Organization in Insurance / financial sector in India	20
	2-4 years >4-6 years >6 years	10 15 20
(iii)	Experience in Goods and Services Tax Consultancy	20
	3-4 years >4-6 years >6 years	10 15 20
(iv)	Number of Organizations to which Goods and Services Tax consultancy provided during last 2 financial years	20

	Upto 2 Organizations	10
	>2-5 Organizations	15
	> 5 Organizations	20
(v)	Presentation	20
	Accounting and GST rules pertaining to Insurance sector	5
	Proposed Approach and Work Methodology of the Consultant	5
	GST consultancy Case study	10
	Total of Technical Bid	100

8.6 Method of Selection (QCBS):

8.6.1 The financial bids of applicants, who qualify at technical evaluation stage, will only be opened.

8.6.2 The work is to be awarded to the technically qualified bidder whose financial bid is evaluated as the lowest (L1) If more than one bidder has quoted the same lowest evaluated price, the bidder with the higher technical score will be selected.

8.6.3 The **Tender Evaluation Committee** will correct any computational errors. When correcting computational errors, in case of discrepancy between words and figures, the former will prevail.

8.6.4 After opening of financial proposals, the bidder will be declared eligible for engagement as CA cum GST Consultant. She / he will then be invited for negotiations, if considered necessary.

9. Submission of bids

9.1 Bidders will submit the bids/proposals online through CPP portal as per the instructions given in clause 1.

9.2 Incomplete bids will be rejected summarily. The Directorate of Postal Life Insurance may, where desired necessary, seek further clarifications from any/all Applicants (bidders) at any stage in respect of any information provided in the RFP document. The Applicant must furnish clarifications within the stipulated time frame, failing which the bids submitted by the Applicant concerned will be treated as incomplete.

10. Right of acceptance

10.1 The Directorate of Postal Life Insurance, Department of Posts reserves the right to accept or reject any or all the Offers for a stated reason thereof and does not bind itself to accept the lowest or any tender. The decision of Directorate of Postal Life Insurance, Department of Posts in this regard will be final and binding.

10.2. Any failure on the part of participating bidder to observe the prescribed procedure and any attempt to canvass for the work will prejudice her / his participation.

11. Period of engagement

11.1 Period of engagement of the CA cum GST Consultant will be initially for a period of **two** years from the date of signing of agreement and it may be extended by a period upto one year on the same terms and conditions with mutual consent of both parties.

12. Criterion for evaluation of bids

12.1 Bids will be evaluated as per clause 8 above. It must be kept in view that the decision given by the Tender Evaluation Committee and accepted by the Competent Authority will be final and binding. The award of work will be further subject to specific terms & conditions of the contract.

13. Communication of Acceptance

13.1 Successful participating bidder shall be informed of the acceptance of his/ her offer by the Department.

14. Termination of offer

14.1 In case the performance of the CA cum GST Consultant so selected is found unsatisfactory, the contract is liable to be terminated after giving one-month notice.

15. Validity of Bid

15.1 The bid shall be valid for a period of 180 days from the date of opening of the bid. Bids of shorter validity period will be summarily rejected.

16. Format for Technical and Financial Bids are given in Annexure-I, II, III & IV respectively. The Technical Bid and Financial Bid should be submitted along with cover letter mentioned in Annexure VII (1.1) and Annexure VII (1.2).

17. Earnest Money:

17.1 In lieu of Bid Security, bidders are requested to sign "Bid Securing Declaration" accepting that if they withdraw or modify their bids during period of validity etc., they will be suspended for three years from the date of opening of Bids. Format of "Bid Securing Declaration" is annexed as Annexure VI. The Bid Securing Declaration form should be given on Rs 100/- Non judicial Stamp Paper.

18. Bidding Terms:

Tender/bid shall be rejected summarily on the following grounds:

- (i) If the offer is received after the date and time prescribed for their receipt, irrespective of the fact whether the tender has been opened or not.
- (ii) If the offer has not been signed by the participating CA cum GST Consultant.
- (iii) If the offer is incomplete in any respect.
- (iv) An offer is submitted without following the prescribed procedures etc.
- (v) If the candidate refuses to accept any of the terms and conditions.
- (vi) If the conditions of the offer are altered.
- (vii) If it is found that candidate is not complying with any of the provisions directly associated with the proposed offer.

- (viii) If he does not satisfy any of the mandatory pre-requisite criterion.
- (ix) If the offer is received without prescribed Bid Securing Declaration.
- (x) If bidder(s) fail to upload /submit Bid Security Declaration form.

19. Terms of payment of Fees:

Following are terms of payment of fees:

- (i) No payment will be made in advance.
- (ii) The CA cum GST Consultant will submit Invoice on monthly basis for sanction of the amount of the bill.
- (iii) All payments shall be made by cheque only/ bank transfer.
- (iv) The term “Payments” mentioned in this Para includes all types of Payments due to the CA cum GST Consultant arising because of this contract excluding Security Deposits, if any, which are governed by separate Clauses of the contract.
- (v) CA cum GST Consultant will not function in any other capacity which would result in conflict of interest in performing his/her role as a CA cum GST Consultant. The consultant shall not receive any other remuneration from any source in connection with the same assignment except as provided under the contract.
- (vi) All the payments to CA cum GST Consultant will be subject to deduction of TDS/ TDS under GST as applicable from time to time.
- (vii) No other charges/fees/taxes etc will be payable except the fee quoted in Annexure IV and GST.

20. Performance Security:

20.1 The successful applicant must, at its own expense, deposit with the PLI, within fifteen (15) working days of the date of notice of award of the contract or two (2) working days prior to signing of the contract, whichever is earlier, an unconditional and irrevocable performance security in the form of Insurance Surety Bonds, Account Payee Demand Draft, Fixed Deposit Receipt from a Commercial bank, Bank Guarantee including e- Bank Guarantee from a Commercial bank, to the PLI, payable on demand, for the due performance and fulfilment of the contract by the applicant. The quantum of the performance security would be equivalent to **5 %** of the total contract value rounded off to the nearest thousand Indian Rupees. Performance security should be valid for a period of at least six months beyond the date of completion of his/her contract.

20.2 The performance security deposit can be forfeited by order of Department of Posts in the event of any breach or negligence or non-observance of any condition of the contract or for unsatisfactory performance.

20.3 No Interest will be paid on the Performance Security by the Department of Posts.

21. Arbitration:

In event of any dispute or difference between the parties hereto, such disputes or differences shall be resolved amicably by mutual consultation. If such resolution is not possible, then the unresolved dispute or difference shall be referred to arbitration of the sole arbitrator to be appointed by the Secretary, Department of Posts, Ministry of Communications on the recommendation of the Secretary, Department of Legal Affairs (“Law Secretary”), Government of India. The provision of Arbitration and Conciliation Act

1996 (No. 26 of 1996) shall be applicable to the arbitration. The venue of such arbitration shall be at Delhi or any other place, as may be decided by the arbitrator. The language of arbitration proceedings shall be English. The arbitrator shall make a reasoned award (the "Award"), which shall be final and binding on the parties. The cost of arbitration shall be shared equally by the parties to the agreement. However, expenses incurred by each party in connection with the preparation, presentation shall be borne by the party itself. Pending the submission of and/or decision on dispute, difference or claim or until the arbitral award is published; the parties shall continue to perform all their obligations under this Agreement without prejudice to a final adjustment in accordance with such award. Dispute, if any, shall be subjected to jurisdiction of court in New Delhi only.

22. Jurisdiction of Court:

22.1 The civil court Delhi alone will have exclusive Jurisdiction to decide any difference, dispute and claim for and against Department of Posts/ CA cum GST Consultant arising out in respect of the said contract.

23. Force Majeure:

23.1 Neither party will be liable in respect of failure to fulfill its obligations, if the said failure is entirely due to Acts of God, Government restrictions or instructions, natural calamities or catastrophe, epidemic or disturbances in the country.

23.2 The party affected by an event of force Majeure will immediately notify the other party of such an event and will also notify the unaffected party on cessation of disability resulting from such Force Majeure.

24. Confidentiality Clause:

PLI, RPLI data and information must be kept confidential and treated as information of commercial nature by the CA cum GST Consultant. Any breach of confidentiality of this data /information will invite termination of contract, forfeiture of performance security and any other payable amount by the Department of Posts.

25. Penalty clause

The Selected CA cum GST Consultant must physically attend office at Directorate of Postal Life Insurance as specified in Clause 4 A (v) of this RFP. He / She will also have to adhere to the timelines stipulated by the office for completion of various works. Failure to complete the work as per timelines on more than 2 occasions would lead to deduction of 10% penalty from the monthly bill of the CA cum GST Consultant. Proportionate payment will be deducted from the monthly payable amount on account of absence of the CA cum GST Consultant from Directorate of Postal Life Insurance as per the contractual requirement. No leave of any kind would be granted to the Consultant.

Frequent absence of the CA cum GST Consultant from Directorate of Postal Life Insurance office without completion of the stipulated attendance requirement may lead to cancellation of the contract and forfeiture of the performance security deposited by the CA cum GST Consultant.

26. The engagement of the CA cum GST Consultant is being done purely on a contractual basis for a limited period. Such engagement will not bestow any right upon the CA cum GST

Consultant to claim regular employment in the Department of Posts at any time.

Chief General Manager (PLI)

**Ministry of Communications
Department of Posts
(Directorate of Postal Life Insurance)
Chanakyapuri, New Delhi-110021
General Information & Checklist**

1	Name of the Chartered Accountant cum Goods and Services Tax Consultant	:	
2	Date of Birth (certificate to be uploaded)	:	
3	Qualifications:		
	(i) Educational	:	
	(ii) Professional	:	
4	Nationality	:	
5	Address:		
	(i) Permanent Address	:	
	(ii) Present/ Correspondence Address	:	
6	Contact information		
	(i) Telephone No.	:	
	(ii) Mobile No.	:	
	(iii) Alternate Mobile No.	:	
	(iv) E-mail id	:	
7	Are you based/headquartered in Delhi/NCR of Delhi (Yes/No). Bidders who are based/ headquartered in other parts of the country may also apply subject to the condition that she/ he should be based/ headquartered in Delhi / National Capital Region (NCR), after selection.	:	

8	Are you a Member of Institute of Chartered Accountants of India? If yes, documentary proof of this should be uploaded.	:															
9	Have you committed any breach of professional conduct? A certificate to this effect to be uploaded on portal as per clause 5 (iv)	:															
10	Do you have a valid certificate of practice (COP) issued by Institute of Chartered Accountants of India? If yes, proof of this should be uploaded.	:															
11	Is any disciplinary action/ court case pending? Have you been blacklisted by any Government Organization? Certificate to be uploaded as per clause 5 (v).	:															
12	Experience of working as a Chartered Accountant in India as per clause 6 (i) (Please upload documents in support of experience)	:	<table border="1"> <thead> <tr> <th><u>Name of Organization</u></th> <th>Period (from / to)</th> <th>Total period (In years)</th> </tr> </thead> <tbody> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> </tbody> </table>	<u>Name of Organization</u>	Period (from / to)	Total period (In years)											
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14	Experience of Goods and Services Tax Consultancy to an organization in India as per clause 6 (iii). (Please upload documents in support of experience)	:	<table border="1"> <thead> <tr> <th><u>Name of Organization</u></th> <th>Period (from / to)</th> <th>Total period (In years)</th> </tr> </thead> <tbody> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> </tbody> </table>	<u>Name of Organization</u>	Period (from / to)	Total period (In years)											
<u>Name of Organization</u>	Period (from / to)	Total period (In years)															

15	Number of organizations to which Goods and Services Tax Consultancy was provided in the last 2 financial years as per clause 6(iv)		<u>Name of Organization</u>	Fin Year
16	Whether Bid Securing Declaration form attached? (Annexure VI) (Yes/No)	:		
17	My offer shall remain valid for a period of 180 days from the date of opening of bid.			
18	I certify that I have never been blacklisted by any Central / State Government organization and have no criminal case pending against me in any Court in India.			

Signature _____

Name :

Date :

**Ministry of Communications
Department of Posts
(Directorate of Postal Life Insurance)
Chanakyapuri, New Delhi-110021**

**Format to be adopted by Tender Evaluation Committee for evaluation of Pre-
Qualification Criteria (Clause 5 and Clause 8.1 of RFP document)**

Sl. No.	Item	Required Response
1	She / he should be a citizen of India	Yes
2	She / he should be based / headquartered in Delhi / National Capital Region (NCR) of Delhi. If not, She/ he is ready to be based / headquartered in Delhi / National Capital Region (NCR), after selection.	Yes
3	She / he should be a Member of the Institute of Chartered Accountants of India on the date of submission of the bid document.	Yes
4	She / he should possess a valid Certificate of Practice (CoP) issued by the Institute of Chartered Accountants of India on the date of submission of the bid document.	Yes
5	She / he should not have committed breach of professional conduct.	Yes
6	No disciplinary action by the Institute of Chartered Accountants of India or any other professional body or a case in any Court of Law should be pending against her / him on the date of submission of the bid document. He/she should not have been blacklisted by any Central or State Government Organization	Yes
7	She / he should not be over the age of forty -five (45) years on the date of submission of the bid document.	Yes

Note:

(i) If the answer is yes in all the above 7 (Seven) items, the bidder will be considered qualified at Pre-Qualification stage.

(ii) The offers not meeting any of the above 7 (Seven) pre-qualification criteria will be summarily rejected.

Ministry of Communications
Department of Posts
(Directorate of Postal Life Insurance)
Chanakyapuri, New Delhi-110021

Format to be filled by bidder for evaluation of Technical Bid
(Clause 6 and Clause 8.2 of RFP document)

Sl No	Item	Response		
1.	Experience of working as a Chartered Accountant in India as per clause 6 (i) (Please upload documents in support of experience)	<u>Name of Organization</u>	Period (from / to)	Total period (In years)
2	Experience of handling accounting related matters of Organization in Insurance / Financial sector in India as per clause 6 (ii). (Please upload documents in support of experience)	<u>Name of Organization</u>	Period (from / to)	Total period (In years)
3	Experience of GST Consultancy to an organization in India as per clause 6 (iii). (Please upload documents in support of experience)	<u>Name of Organization</u>	Period (from / to)	Total period (In years)
4	Number of organizations to which GST Consultancy was provided in the last 2 financial years as per clause 6(iv) (Please upload documents in support of experience)	<u>Name of Organization</u>	Fin Year	Fin Year
			Year	

Signature _____

Name :

Date :

**Ministry of Communications
Department of Posts
Directorate of Postal Life Insurance
Chanakyapuri, New Delhi-110021**

FORMAT FOR QUOTING FINANCIAL BID

Name of the Bidder:

Sl No	Particulars of Service	Amount in INR (in figures)	Amount in INR (in words)
1	Monthly GST Consultancy Fee (inclusive of all charges/fees/ taxes etc excluding GST)		

Signature

Name

Date :

Note:

1. The fee quoted by the Bidder should be inclusive of all charges/fees/taxes etc excluding GST.
2. The fee quoted should be unconditional and inclusive of the expenditure to be incurred on the work mentioned in clause 4 of the RFP.
3. If a bidder quotes NIL charges / consideration, the bid shall be treated as unresponsive and will not be considered.
4. No other charges/fees/taxes etc will be payable except the fee quoted above and GST.

FORMAT FOR BANK GUARANTEE FOR PERFORMANCE SECURITY

To

The President of India

WHEREAS (Name and Address of the Bidder) (hereinafter called “the CA cum GST Consultant”) has undertaken, in pursuance of contract no..... datedto provide Consultancy services for Department of Posts (herein after called “the employer”). AND WHEREAS it has been stipulated by you in the said contract that the CA cum GST Consultant shall furnish you with a bank guarantee by a scheduled commercial Bank recognized by you for the sum specified therein as security for compliance with its obligations in accordance with the contract;

AND WHEREAS we have agreed to give the Bidder such a bank guarantee;

NOW THEREFORE we hereby affirm that we are guarantors and responsible to you, on behalf of the Consultant, up to a total of Rs. _____ (Rs _____ only) (amount of the guarantee in words and figures), and we undertake to pay you, upon your first written demand declaring the Consultant to be in default under the contract and without cavil or argument, any sum or sums within the limits of (amount of guarantee) as aforesaid, without your needing to prove or to show grounds or reasons for your demand or the sum specified therein.

We hereby waive the necessity of your demanding the said debt from the CA cum GST Consultant before presenting us with the demand.

We further agree that no change or addition to or other modification of the terms of the contract to be performed there under or of any of the contract documents which may be made between you and the Bidder shall in any way release us from any liability under this guarantee and we hereby waive notice of any such change, addition or modification.

This BANK GUARANTEE shall be interpreted in accordance with the laws of India.

The Guarantor Bank represents that this BANK GUARANTEE has been established in such form and with such content that is fully enforceable in accordance with its terms as against the Guarantor Bank in the manner provided herein.

This BANK GUARANTEE shall not be affected in any manner by reason of merger, amalgamation, restructuring or any other change in the constitution of the Guarantor Bank.

The Bank further undertakes not to revoke this Guarantee during its currency except with the previous express consent of Department of Posts, in writing.

The Bank declares that it has power to issue this Guarantee and discharge the obligations contemplated herein, the undersigned is duly authorized and has full power to execute this Guarantee for and on behalf of the Bank.

This guarantee will remain in force up to and including 180 days after the period of tender validity i.e. date of completion of his/her tenure/contract and any demand in respect thereof should reach the Bank not later than the above date.

This guarantee shall be valid until the day of, 2025

(Signature of the authorized officer of the Bank)

.....

Name and designation of the officer

.....

.....

Form of Bid-Security Declaration

To:
Chief General Manager, PLI Directorate,
Directorate of Postal Life Insurance,
Chanakyapuri Post Office Complex, New
Delhi - 110021

We, the undersigned, declare that:

We understand that, according to your conditions, bids must be supported by a Bid-Securing Declaration.

We accept that we will automatically be suspended from being eligible for bidding in any contract with the Department of Posts for the period of time of 3 years from the date of opening of bid (s)., if we are in breach of our obligation(s) under the bid conditions, because we:

- (a) have withdrawn our Bid during the period of bid validity specified in the Letter of Bid; or
- (b) having been notified of the acceptance of our Bid by the Department of Posts during the period of bid validity, (i) fail or refuse to execute the Contract, if required, or (ii) fail or refuse to furnish the Performance Security.

We understand this Bid-Securing Declaration shall expire if we are not the successful Bidder, upon the earlier of (i) our receipt of your notification to us of the name of the successful Bidder; or (ii) twenty-eight days after the expiration of our Bid.

Signed: [insert signature of person whose name and capacity are shown] In the capacity of [insert legal capacity of person signing the Bid-Securing Declaration]

Name: [insert complete name of person signing the Bid-Securing Declaration]

Duly authorized to sign the bid for and on behalf of: [insert complete name of Bidder]

Dated on _____ day of _____, [insert date of signing] Seal (where appropriate)

Formats for Covering Letter, Clarification, Deviation, Undertaking and Affidavit

1.1 Technical Proposal Covering Letter

(To be submitted on the official letterhead of the Applicant submitting the proposal).

Ref: _____

Date and place: _____

Chief General Manager, PLI Directorate,
Directorate of Postal Life Insurance,
Chanakyapuri Post Office Complex,
New Delhi - 110021

Dear Sir,

Ref: Request for Proposal (RFP): Appointment of Chartered Accountant cum Goods and Services Tax Consultant

I refer to the Request for Proposal (RFP) for Appointment of CA cum GST Consultant. I have read and understood the contents of the RFP document and pursuant to this, I hereby confirm that I am legally empowered to act as CA cum GST Consultant and satisfy the requirements laid out in the RFP document.

Having examined the RFP document, the receipt of which is hereby duly acknowledged, I, the undersigned, offer to provide the services as required and outlined in the RFP for Appointment of CA cum GST Consultant.

To meet such requirements and provide such services as set out in the RFP documents, I attach hereto our response to the RFP document, which constitutes our proposal for being considered for selection as CA cum GST Consultant.

I undertake, if our proposal is accepted, to adhere to the stipulations put forward in the RFP or such adjusted plan as may subsequently be mutually agreed between us and Postal Life Insurance or its appointed representatives.

I agree to unconditional acceptance of all the terms and conditions set out in the RFP documents.

I confirm that the information contained in this proposal or any part thereof, including its exhibits, schedules, and other documents delivered to Directorate of Postal Life Insurance is true, accurate, and complete. This proposal includes all information necessary to ensure that the statements therein do not, in whole or in part, mislead PLI as to any material fact.

Yours faithfully,

For and on behalf of _____ (Insert company name)

Authorized Signatory

(Name of Authorized Signatory along with signature along with company seal)

Email ID – (used for uploading the bids on CPP Portal) : _____

1.2 Financial Proposal Covering Letter

(To be submitted on the official letterhead of the Applicant submitting the proposal)

Ref: _____

Date and place: _____

Chief General Manager, PLI Directorate,
Directorate of Postal Life Insurance,
Chanakyapuri Post Office Complex,
New Delhi - 110021
Dear Sir,

Ref: Request for Proposal (RFP): Appointment of Chartered Accountant cum Goods and Services Tax Consultant

Having examined the RFP document, the receipt of which is hereby duly acknowledged, I, the undersigned, offer to provide the services as required and outlined in the Request for Proposal (RFP) for Appointment of CA cum GST Consultant.

To meet such requirements and to provide services as set out in the RFP document I attach hereto our response as required by the RFP document, which constitutes our proposal.

I undertake, if our proposal is accepted, to adhere to the stipulations put forward in the RFP or such adjusted plan as may subsequently be mutually agreed between us and PLI or its appointed representatives.

I unconditionally accept all the terms and conditions set out in the RFP document.

I confirm that the information contained in this proposal or any part thereof, including its schedules, and other documents delivered to Directorate of Postal Life Insurance is true, accurate, and complete. This proposal includes all information necessary to ensure that the statements therein do not, in whole or in part, mislead Directorate of Postal Life Insurance as to any material fact.

Yours faithfully,

For and on behalf of _____ (Insert company name)

Authorized Signatory

(Name of Authorized Signatory along with signature along with company seal)

1.3 Request for clarifications

Applicant's Request For Clarification			
Name of Person submitting request		Name & position of person submitting request	Address of person including phone, fax, email, points of contact
			Tel: Fax: E-mail:
Sr.No.	Reference (Clause No. /Page No.)	Content of RFP requiring clarification	Points of Clarification required
1			
2			
3			