



IIM NAGPUR

भारतीय प्रबंध संस्थान नागपुर  
Indian Institute of Management Nagpur

INDIAN INSTITUTE OF MANAGEMENT,  
NAGPUR

Account Department, IIM Nagpur, VNIT campus,  
South Ambazari Road,  
Nagpur – 440010

Ph.No. – 07127102361 Email:  
amaccounts@iimnagpur.ac.in

Reference no. IIMN /Account/2018-19/02

Dated 20.02.2019



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भारतीय प्रबंध संस्थान नागपुर  
Indian Institute of Management Nagpur

Name of the Work /service

Expression of Interest- Tender for Engagement of Tax Consultant firm for Indian Tax Matters to IIM  
Nagpur



Client

Indian Institute of Management, Nagpur , Maharashtra -440010

Phone: 0712-7102361,+91-9881465567

Website: [www.iimnagpur.ac.in](http://www.iimnagpur.ac.in)



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**Timeline**

Sr. No.	Date	Time	Event
1	06.03.2019	3.00 PM	Pre-Bid Meeting
2	11.03.2019	3.00 PM	Submission of BIDS
3	11.03.2019	3.30 PM	Opening of BIDS
4	12.03.2019	3.30 PM	Opening of Price BIDS

**List of Annexures**

Annexure 1	Check list for documents to be submitted
Annexure 2	Bid Performa





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## Chapter - 1

### Background and Scope of work

#### 1.1 Introduction:

Indian Institute of Management Nagpur started functioning in 2015 (under the guidance and mentorship of Indian Institute of Management Ahmedabad, one of the top institutes of management in India and the Asia-Pacific.) IIM Nagpur is located within the campus of VNIT Nagpur till it moves to its own campus (of approx 135 acres) later.

The institute started its first batch of Post Graduate Program (PGP) in Management on 23rd July 2015. As a new generation IIM, IIM Nagpur aims to innovatively address the needs of a modern India, connecting aspirations and realities to attain benchmarks that are respected internationally. IIM Nagpur would slowly increase its portfolio of activities to fulfil these objectives.

The Post Graduate Programme (PGP) in Management at IIM Nagpur, leading to a Master's Degree in Management (equivalent to MBA) is a two year, full time, residential programme. It aims to create leaders, managers and entrepreneurs with strong conceptual foundations and analytical rigour rooted in a sound understanding of the socio-economic context, regardless of the sector they work in, be it business, not-for-profit, government-related or social change

#### 1.2. Scope of Work:

IIM Nagpur intends to engage a firm if tax consultant (hereinafter consultant) for as initial contact period of one year which likely to be extended for further two years depending on satisfactory performance of the consultant.





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The consultant must have vast experience in handling various Direct and Indirect Taxation issues. Expertise in GST matters and TDS is a core requirement for IIM N . under the area of direct and Indirect Taxes.

- The current volume of work may be anticipated to approx. 200 payment vouchers per month.
- Current staff strength of 40 employees and likely to increase gradually.

The consultant will have to undertake the activity of Q4 for FY 2018-19 and annual activities for FY 2018-19. The tax consultant (firm) will have to undertake all services w.r.t. scope of work mentioned below during the contract period irrespective for any Financial Year.

### 1.2.1 Indirect Tax

#### A. Goods and service Tax (GST ) Retainership

- Computation of monthly GST liability and preparing the challans.
- Computation of monthly GST credit and adjustments thereof.
- Maintenance of the GST Credit register for input services used based on documents provided by the client
- Reconciling of the GST liability account on regular basis.
- Preparation and submission of the monthly/quarterly/half-yearly returns in appropriate Form of GST.
- Scrutinizing documents from time to time to ensure proper compliance.
- Providing updates on statutory changes in GST related matters to the Client.
- Causing appearance and making submissions in the course of assessments
- Providing monthly information of GST liability and GST credit as applicable to IIM N
- Preparation and submission of replies against the notice issued by the tax authority from time to time





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- Computation of monthly GST liability for purchases of goods and services made from unregistered suppliers/vendors.
- Computation of monthly GST liability for reverse tax mechanism.
- Providing assistance and guidance for any changes required in the ERP system for GST implementation at present/future.
- Handling all assessment proceedings initiated by appropriate authorities including drafting/filing of replies and submissions, representation before the authorities for assessment proceedings, drafting/filing of submissions with authorities regarding rectification applications including any penalty proceedings as applicable, drafting/filing the submissions for stay of any demand, review of orders, etc. and attending hearing.

### 1.2.2 Direct Tax

#### A. Annual tax Return and Withholding Tax Compliance

- i. Filing of Annual Income – Tax return as per provision of the Income Tax Act.
- ii. Under the Indian tax laws, educational institutions are also required to deduct the tax at source on various payments made on account of both domestic and international transactions. Further, the law imposes an obligation on the companies to deduct tax and deposit the same with the Government on timely basis. Educational Institutions are also required to issue certificates for the tax deducted at source (TDS) to the payee and file quarterly TDS return with the tax authorities.
  - Prepare and review of monthly and quarterly statements in respect of tax deducted/deposited from Salary, Honorarium and Contractors, etc. before filing return.
  - Filing of the TDS return in due time as per the provision of the Income Tax Act





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- Generation of TDS certificate from TRACES as per the time limit of issue of the same to Contractors/ employees
- Institute is also required to deduct the tax at source on various payments made on account of international transactions, so consultant will generate form No 15CA/15CB and assist in arriving at correct rate of TDS on such foreign payment.

iii. Failure to comply with the TDS provisions will attract levy of interest and penalty. Hence the timely compliance should be done.

iv. Given the onerous TDS requirements under the Act, it is pertinent that IIM Nagpur monitors its payments for the applicability of TDS and also complies with the provisions under the Act.

v. Handling 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. and attending hearing

vi. Advising IIMN 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 IIM N in various Statutory Authorities and representing IIMN in ITAT cases.

vii. Pursuing, assisting and coordinating with Income Tax Authorities for timely getting the refunds due to IIMN.





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viii. Rendering expert opinion as and when required by IIM N for all the taxation issues including international taxation matters, etc. Updating IIM N on all day to day changes in relevant taxation laws and suggesting measures for effective adaptation of changes in IIMN, wherever required.

ix . Services for obtaining 12 A and 80 G certificate from Income Tax Authorities

x Advice on tax withholding rates on various categories of payments (including salary); and

xi Prepare and review of quarterly statements in respect of tax deducted/deposited from Salary, Honorarium and Contractors, etc. before filing return.

Xii The consultant is requested to obtain lower/NIL withholding tax certificates whenever required. In this regard, the scope of service would be as under:

- Filing of application and submissions/replies to be filed with the income tax authorities in relation to the above;
- Providing representation and appearance before the income tax authorities in connection with the issue of lower/Nil withholding tax certificates;
- Filing additional letter/application and representation before the income tax authorities in connection with updating the list of payer in the certificate obtained by IIMN, if required.

Xiii If the penalties and interest are levied by the govt authorities, it will be sole discretion of the Director regarding the recovery of the same from the consultant.

### 1.2.3 FCRA

The Institute is in process of registration under Foreign Contribution (Regulation) Act 2010. It is expected from the appointed Tax consultant to assist IIM N in obtaining this and facilitate





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further compliance. The Consultant will prepare and furnish Annual Returns and other necessary compliances in regard to FCRA.

**1.2.4 Compliances w.r.t Societies Registration Act ,1860 and Bombay Public Trust Act, 1950.**

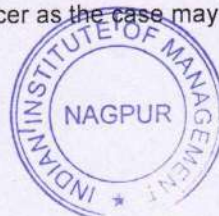
Indian Institute of Management, Nagpur (IIMN) is a society registered under Societies Registration Act, 1860 and a Public Trust under Bombay Public Trust Act, 1950.

- Filing of Annual return as per provision of the Societies Registration Act ,1860 and Bombay Public Trust Act, 1950.
- Handling all assessment proceedings initiated by appropriate authorities including drafting/filing of replies and submissions, representation before the authorities for assessment proceedings, drafting/filing of submissions with authorities regarding rectification applications including any penalty proceedings as applicable, drafting/filing the submissions for stay of any demand, review of orders, etc. and attending hearing

**1.2. 5 On site visit**

i. One representative of the Tax Consultant firm, having knowledge of Tax matters, will be required to visit the IIM N as when required (may be on daily basis) or atleast once in a week to verify all the deduction of tax on account of TDS And GST and preparation of challan for GST and TDS and file monthly/quarterly return and file correction statement if any. The representative will be required to visit the IIMN on a short notice for discussing any urgent matters with the FAO & Assistant – Finance & Accounts Officer.

ii. Partner/professional CA assigned for this project of the Tax Consultant firm should be available at least one day in a month to discuss important and pending issues. The Consultant will be required to visit the IIMN on a short notice for discussion on urgent matters with the Director/CAO/Advisor (Finance)/ FAO/Assistant – Finance & Accounts Officer as the case may be.







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## Chapter – 2

### General conditions of Contract

#### 2.1 Application fee and EMD:

Application fees (Rs. 1000/-+ GST 180/-) Total 1180/- and EMD is Rs. 10,000/- to be submitted along with PQ envelop . Two separate DD of Nationalise Bank to be attached along with PQ for Application Fees and EMD in the name of Indian Institute of Management , Nagpur payable at Nagpur. EMD will be refunded to the firm after award of contract.

#### 2.2 Period of Appointment:

The initial period of Appointment will be ONE year. Consultant may be reappointed for the same type of work up to a maximum period of further two years at the discretion of the Institute.

#### 2.3 Assignment & sub-contract:

Selected Firm / LLP shall not assign, sub-contract or sub-let the whole or any part of the service in any manner without express approval of the institute.

#### 2.4 Payment Terms :-

For Regular work – 70% of the yearly contracted fees payable on quarterly basis after successful rendering of services for each quarter.

For Annual work :- 30% of the yearly contracted fees payable on successful completion of Annual activity of each year.





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**2.5 Confidentiality and Disclaimer:**

All information supplied by IIMN in connection with this EO must be treated as confidential and, for the avoidance of doubt, all parts of the EO are to be treated confidentially by Bidders.

**2.6 Arbitration:** All disputes regarding quality of service, specifications and rates shall be settled mutually by making references to conditions of contract, documents or prevailing local practices etc.; but if not settled mutually, shall be referred to arbitration as mandated in the Arbitration and Conciliation Act, 1996 and its amendments or modifications to-date.

**2.7 Exit clause:**

Both the parties can terminate the contract at any time at the end of the period of a particular financial year when the term expires. The contract can also be terminated by either side after giving one month's notice period.

2.8 Evaluation of price Bid shall be done only in the cases where the bidder meets the prequalification criteria as mentioned above. The Price bid offered by the bidders shall be scrutinised considering the cost offered. In case the rates offered by the bidder is on higher side as against the estimated cost arrived at by IIM Nagpur the same shall not be considered. the lowest offer if otherwise in order shall be considered for placement of contract.

**2.9 Prices, Taxes, Duties:**

The price quoted by the Bidder shall be firm and final and no increase on what so ever account shall be admissible except for increase / decrease of government levy. If the contract period is extended for further period, the rate will be mutually decided by the Institute and the bidder considering the factors contributing to the increasing the cost. However, when consultant has to incur additional expenses in connection with scope of work for travel and lodging outside Nagpur the same shall be reimbursed as per prevailing rules of IIM Nagpur.





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### 3.0 Contract agreement:

The successful Bidder shall be required to execute a contract Agreement with IIMN on the non-judicial stamp paper of Rs. 100/- (Rupees One hundred only). The cost of stamp paper shall be borne by successful Bidder. IIMN reserves the right to amend the terms & conditions of contract after Mutual discussions and shall only be in writing.





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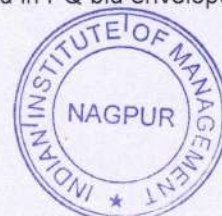
Chapter - 3

Pre – Qualification

3.1	Only those Bidders who meet the following minimum criteria will be considered for evaluation:
3.1.1	The applicant firm should be a partnership firm with minimum two full time partners.
3.1.2	The applicant firm should in practice for more than 10 years as per records of the Institute of Chartered Accountants of India (ICAI)
3.1.2	The applicant firm should be registered with GST and should have annual turnover of more than 25.00 Lacs in each of financial years 2015-16,2016-17,2017-18.
3.1.3	Experience of handling taxation assignments or other relevant assignment of Educational Institution(s) such as IIT's, IIM's ,NIT's or any other centrally funded institute is desirable. Furnish copy of the documentary evidence in support of the handling of taxation matters.
3.1.4	Registered office of the firm should be with Nagpur jurisdiction .
3.1.5	DD for Application fees and EMD as per chapter 2.1

**3.2 Submission of documents to assess pre-qualification criteria:**

Bidders must submit the documentary proof in support of meeting the prequalification criteria. Simply an undertaking signed by the bidder for any item of the criteria shall not suffice. All the documentary proofs must be enclosed in a separate envelope marked as "Documentary Proofs for Pre-Qualification Criteria" and this envelope should be enclosed in PQ bid envelope.





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Bidders fulfilling the above criteria will be shortlisted for evaluation.

### 3.3 Expenses to be borne by bidder

All expenses in preparation and submission of EOI and visits to the office or any place in connection with the preparation of EOI shall be borne by the applicant. IIMN, in no case shall be responsible or liable for these costs regardless of the outcome of the EOI process.



Sr. No.	Description	Maximum Marks
1.	Candidate will at least 10 years of experience	10 Years - 10 Marks





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Chapter – 4

**Bid Evaluation**

4.1 Technical bid will be assessed for 60 marks & price bid for 40 marks.

4.1.1 if the score of bidder in technical bid is below 60 % (30 Marks) then the bidder will not be considered for further evaluation. Price bid of such bidders will not be opened.

4.2 Price Bids of only those bidders shall be considered for opening and evaluation, whose bid is determined to be technically acceptable to IIM N .

4.3 Evaluation of price bid shall be taken up to determine the competitive prices of the techno-commercially acceptable bids and include the following:

4.3.1 During Price bid opening only average technical score of agency will be read out by price bid opening committee before opening of price bids.

4.3.2 The quoted prices shall be checked to determine the arithmetical correctness of the same.

4.3.3 A bidder having highest composite score of Technical and Price Bid will be selected for award of contract.

4.3.4 IIMN reserves the right to accept/ reject any tender in part or full, without assigning any Reason whatsoever.

4.3.5 IIMN reserves their right to negotiate the quoted price.

4.3.6 Technical bid score, out of 60, will be arrived based on the following

Parameters / Attributes / Dimensions:

Sr. No.	Description	Maximum Marks
1	CA firm with at least 10 years of existence	10 Years -15 Years -6 Marks





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		15-20 Years – 8 Marks  20 years and above- 10 Marks
2	Annual Turnover of the firm	25Lacs- 30 lacs – 6 Marks  30 Lacs -50 Lacs -8 Marks  50 Lacs and above – 10 Marks
3	Number of Key Professionals & their Post Qualification experience	10 Marks
4	Profile of Professionals proposed to be assigned to IIM Nagpur	10 Marks
5	Experience of handling taxation assignments or other relevant assignment of Educational Institution(s) such as IIT's, IIM's ,NIT's or any other centrally funded institute. Furnish copy of the documentary evidence in support of the handling of taxation matters.	10 Marks
	TOTAL	50 Marks

As per the annexures and on the basis of supporting documents related to experience. The firm scoring highest marks (H1) in technical assignment and will be assigned score as 60 .Each of the will be score below

Total score of firm X= (Marks assigned by firm being evaluated \* 60) / (Marks scored by H1)





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4.3.7 Methodology for arriving at the Price of Bidders:

**Price bid score "Y shall be out of 40**

$$Y = \text{Score of Price bid} = 40 * (\text{Price quoted by lowest agency})$$

(Price quoted by an agency)

Formula to calculate total score of an agency:

$$\text{Total Score out of 100} = X + Y$$

The bidder getting the highest composite techno-commercial score (X+Y) will be awarded the contract.

Notes:

1. IIM N reserves the right NOT to award the work to the highest scorer.
2. IIMN reserves the right to reject any or all bids without assigning any reason.
3. IIMN reserves the right to increase or decrease the scope of work.
4. IIM N reserved the right to award the work in case equal score of bidders.







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Chapter – 5

EOI Process

5.1 All pages of EOI documents shall be stamped and signed by the applicant.

5.2 The EOI that will be submitted by the applicant should consist of the following two separate sealed envelopes in the sequence given below:

Envelop 1 (should be labelled as "PQ Documentary Proofs".)	Original EOI document signed and stamped on each page. Pre-Qualification - All documentary proofs in support of meeting the pre-qualification criteria as specified in Chapter 3.
Envelope – 2	EOI Bid As per IIM Nagpur format.

5.3 Terms & Conditions:

5.3.1 EOI may be sent by post/ courier to the office of EOI submission authority namely, Asst Manager (Accounts & Compliance ) IIM Nagpur, VNIT Campus , South Ambazari Road , Nagpur 440010. However, IIMN accepts no responsibility for any loss/ delay/ non-receipt of offers not submitted in person. Offers received late/ incomplete are liable for rejection.

5.3.2. In deciding upon the selection of consultant emphasis will be paid on the ability and competency of the firm / LLP to provide high quality services according to the time schedule and in close co-ordination with IIM Nagpur.

5.3.3 IIM Nagpur reserves the right to accept/ reject any EOI in part or full, without assigning any reason whatsoever.





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5.3.4 Pre bid meeting for clarifications on tender will be held at 3.00 PM on 04.03.2019 at IIM Nagpur, VNIT Campus south ambazari road, Nagpur-10





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Annexure 1

Check list of documents to be submitted: The following documents should be enclosed along with the application: -

Sr. No.	Particulars	Checklist for Bidder
1	Number of years of existence	
2	Profile CA firm and of Key Professionals: (please mention the credentials of professional(s) to be assigned to IIM Nagpur 1. Qualification 2. Experience – Minimum 10 years' experience	
3	Profile of Services offered	
4	Experience of handling taxation assignments or other relevant assignment of Educational Institution(s) such as IIT's, IIM's ,NIT's or any other centrally funded institute. Furnish copy of the documentary evidence in support of the handling of taxation matters.	
5	Audited Financial Statements of F.Y. 2015-16 and 2016-17, 2017-18 showing Gross Revenue Receipts of Rs.25 Lacs & above.	
7	Whether any regulatory action including fines / strictures levied in last 5 years	
8	Any other information relevant to your response to this BID that you may wish to provide.	





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9	DD for Application fees and EMD as per chapter 2.1	
10	Copy of PAN and GST registration certificate	
11	Latest data sheet of firm issued by ICAI detailing constitution of firm as on 01/01/2019.	

