

**बिड दस्तावेज़ / Bid Document**

| बिड विवरण/Bid Details                                                                                                       |                                                                                                                                                                                                                                                                  |
|-----------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| बिड बंद होने की तारीख/समय /Bid End Date/Time                                                                                | 07-09-2026 14:00:00                                                                                                                                                                                                                                              |
| बिड खुलने की तारीख/समय /Bid Opening Date/Time                                                                               | 07-09-2026 14:30:00                                                                                                                                                                                                                                              |
| बिड पेशकश वैधता (बंद होने की तारीख से)/Bid Offer Validity (From End Date)                                                   | 30 (Days)                                                                                                                                                                                                                                                        |
| मंत्रालय/राज्य का नाम/Ministry/State Name                                                                                   | Ministry Of Labour And Employment                                                                                                                                                                                                                                |
| विभाग का नाम/Department Name                                                                                                | Na                                                                                                                                                                                                                                                               |
| संगठन का नाम/Organisation Name                                                                                              | Employees Provident Fund Organisation (epfo)                                                                                                                                                                                                                     |
| कार्यालय का नाम/Office Name                                                                                                 | Regional Office Nariman Point                                                                                                                                                                                                                                    |
| शिकायत निवारण के संपर्क विवरण/ Contact details of Grievance redressal                                                       | HOD Email id :rudal.prasad@epfindia.gov.in<br>Buyer Email id: shubhamumar@epfindia.gov.in                                                                                                                                                                        |
| वस्तु श्रेणी /Item Category                                                                                                 | Financial Advisory Services - Offsite; Tax Advisory                                                                                                                                                                                                              |
| अनुबंध अवधि /Contract Period                                                                                                | 2 Year(s) 1 Day(s)                                                                                                                                                                                                                                               |
| बिडर का न्यूनतम औसत वार्षिक टर्नओवर (3 वर्षों का) /Minimum Average Annual Turnover of the bidder (For 3 Years)              | 4 Lakh (s)                                                                                                                                                                                                                                                       |
| उन्हीं/समान सेवा के लिए अपेक्षित विगत अनुभव के वर्ष/Years of Past Experience Required for same/similar service              | 5 Year (s)                                                                                                                                                                                                                                                       |
| टर्नओवर पात्रता मानदंड/Turnover eligibility criteria                                                                        | GeM verified turnover                                                                                                                                                                                                                                            |
| वर्षों के अनुभव एवं टर्नओवर से एमएसई को छूट प्राप्त है / MSE Relaxation for Years Of Experience and Turnover                | Yes   Complete                                                                                                                                                                                                                                                   |
| स्टार्टअप के लिए अनुभव के वर्षों और टर्नओवर से छूट प्रदान की गई है /Startup Relaxation for Years of Experience and Turnover | No                                                                                                                                                                                                                                                               |
| विक्रेता से मांगे गए दस्तावेज़/Document required from seller                                                                | Experience Criteria,Bidder Turnover,Certificate (Requested in ATC)<br>*In case any bidder is seeking exemption from Experience / Turnover Criteria, the supporting documents to prove his eligibility for exemption must be uploaded for evaluation by the buyer |

| बिड विवरण/Bid Details                                                                                                                                                                                                    |                                                                                                                                                                        |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| क्या आप निविदाकारों द्वारा अपलोड किए गए दस्तावेजों को निविदा में भाग लेने वाले सभी निविदाकारों को दिखाना चाहते हैं? संदर्भ मेनू है/Do you want to show documents uploaded by bidders to all bidders participated in bid? | Yes (Documents submitted as part of a clarification or representation during the tender/bid process will also be displayed to other participated bidders after log in) |
| बिड लगाने की समय सीमा स्वतः नहीं बढ़ाने के लिए आवश्यक बिड की संख्या। / Minimum number of bids required to disable automatic bid extension                                                                                | 1                                                                                                                                                                      |
| दिनों की संख्या, जिनके लिए बिड लगाने की समय-सीमा बढ़ाई जाएगी। / Number of days for which Bid would be auto-extended                                                                                                      | 3                                                                                                                                                                      |
| ऑटो एक्सटेंशन अधिकतम कितनी बार किया जाना है। / Number of Auto Extension count                                                                                                                                            | 1                                                                                                                                                                      |
| बिड से रिवर्स नीलामी सक्रिय किया/Bid to RA enabled                                                                                                                                                                       | No                                                                                                                                                                     |
| बिड का प्रकार/Type of Bid                                                                                                                                                                                                | Single Packet Bid                                                                                                                                                      |
| तकनीकी मूल्यांकन के दौरान तकनीकी स्पष्टीकरण हेतु अनुमत समय /Time allowed for Technical Clarifications during technical evaluation                                                                                        | 2 Days                                                                                                                                                                 |
| मूल्यांकन पद्धति/Evaluation Method                                                                                                                                                                                       | Total value wise evaluation                                                                                                                                            |
| मध्यस्थता खंड/Arbitration Clause                                                                                                                                                                                         | No                                                                                                                                                                     |
| सुलह खंड/Mediation Clause                                                                                                                                                                                                | No                                                                                                                                                                     |

#### ईएमडी विवरण/EMD Detail

|                   |    |
|-------------------|----|
| आवश्यकता/Required | No |
|-------------------|----|

#### ईपीबीजी विवरण /ePBG Detail

|                   |    |
|-------------------|----|
| आवश्यकता/Required | No |
|-------------------|----|

बोली विभाजन लागू नहीं किया गया/ Bid splitting not applied.

#### एमआईआई अनुपालन/MII Compliance

|                               |     |
|-------------------------------|-----|
| एमआईआई अनुपालन/MII Compliance | Yes |
|-------------------------------|-----|

#### एमएसई खरीद वरीयता/MSE Purchase Preference

|                                           |     |
|-------------------------------------------|-----|
| एमएसई खरीद वरीयता/MSE Purchase Preference | Yes |
|-------------------------------------------|-----|

|                                                                                                                                                                                                                              |    |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|
| <p>सूक्ष्म और लघु उद्यम मूल उपकरण निर्माताओं/सेवा प्रदाता को खरीद में प्राथमिकता, यदि उनका मूल्य <math>L1+X\%</math> / Purchase Preference to MSE OEMs/ Service Provider available upto price within <math>L1+X\%</math></p> | 15 |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|

1. If the bidder is a Micro or Small Enterprise as per latest orders issued by Ministry of MSME, the bidder shall be relaxed from the eligibility criteria of "Experience Criteria" as defined above subject to meeting of quality and technical specifications. The bidder seeking Relaxation from Experience Criteria, shall upload the supporting documents to prove his eligibility for Relaxation.
2. If the bidder is a Micro or Small Enterprise (MSE) as per latest orders issued by Ministry of MSME, the bidder shall be relaxed from the eligibility criteria of "Bidder Turnover" as defined above subject to meeting of quality and technical specifications. If the bidder itself is MSE OEM of the offered products, it would be relaxed from the "OEM Average Turnover" criteria also subject to meeting of quality and technical specifications. The bidder seeking Relaxation from Turnover, shall upload the supporting documents to prove his eligibility for Relaxation.
3. The minimum average annual financial turnover of the bidder during the last three financial years, ending on 31st March of the previous financial year, should be as indicated in the bid document. The turnover of the bidder shall be validated by the system based on the financial data available on the GeM portal. The average turnover shall be calculated based on the last three financial years where data is available; in case data is available for only two of the last three financial years, the average shall be computed based on those two years. In case the date of constitution / incorporation of the bidder is less than three years old, the average turnover in respect of the completed financial years after the date of constitution / incorporation shall be taken into account for this criterion. No separate documentary evidence is required to be uploaded by the bidder for this criterion, as the system shall derive and validate the turnover figures from the data available on the GeM portal.
4. Years of Past Experience required: The bidder must have experience for number of years as indicated above in bid document (ending month of March prior to the bid opening) of providing similar type of services to any Central / State Govt Organization / PSU. Copies of relevant contracts / orders to be uploaded along with bid in support of having provided services during each of the Financial year.
5. **Purchase preference to Micro and Small Enterprises (MSEs):** Purchase preference will be given to MSEs having valid Udyam Certificate and whose credentials are validated online through Udyam Registration portal as defined in Public Procurement Policy for Micro and Small Enterprises (MSEs) Order, 2012 dated 23.03.2012 issued by Ministry of Micro, Small and Medium Enterprises and its subsequent Orders/Notifications issued by concerned Ministry. If the bidder wants to avail themselves of the Purchase preference, the bidder must be the manufacturer / OEM of the offered product on GeM. In respect of bid for Services, the bidder must be the Service provider of the offered Service. Traders are excluded from the purview of Public Procurement Policy for Micro and Small Enterprises and hence resellers offering products manufactured by some other OEM are not eligible for any purchase preference. Relevant documentary evidence in this regard shall be uploaded along with the bid in respect of the offered product or service, and Buyer will decide eligibility for purchase preference based on documentary evidence submitted in case of product bids, whereas in case of services the eligibility is automatically validated. If L-1 is not an MSE and MSE Seller (s) has / have quoted price within  $L-1+ 15\%$  (Selected by Buyer) of margin of purchase preference /price band defined in relevant policy, such MSE Seller shall be given opportunity to match L-1 price and contract will be awarded for % (selected by Buyer) percentage of total quantity. The buyers are advised to refer the [OM No.1 4 2021 PPD dated 18.05.2023](#) for compliance of Concurrent application of Public Procurement Policy for Micro and Small Enterprises Order, 2012 and Public Procurement (Preference to Make in India) Order, 2017. Benefits of MSE will be allowed only if seller is validated on-line in GeM profile as well as validated and approved by Buyer after evaluation of documents submitted.
6. If L-1 is not an MSE and MSE Service Provider (s) has/have quoted price within  $L-1+ 15\%$  of margin of purchase preference /price band as defined in the relevant policy, then 100% order quantity will be awarded to such MSE bidder subject to acceptance of L1 bid price.
7. Estimated Bid Value indicated above is being declared solely for the purpose of guidance on EMD amount and for determining the Eligibility Criteria related to Turn Over, Past Performance and Project / Past Experience etc. This has no relevance or bearing on the price to be quoted by the bidders and is also not going to have any impact on bid participation. Also this is not going to be used as a criteria in determining reasonableness of quoted prices which would be determined by the buyer based on its own assessment of reasonableness and based on competitive prices received in Bid / RA process.

**अतिरिक्त योग्यता /आवश्यक डेटा/Additional Qualification/Data Required**

**Scope of work to be uploaded by buyer:**[1787814783.pdf](#)

**Financial Advisory Services - Offsite; Tax Advisory ( 1 )**

**तकनीकी विशिष्टियाँ /Technical Specifications**

| विवरण/ Specification                                     | मूल्य/ Values                                       |
|----------------------------------------------------------|-----------------------------------------------------|
| <b>कोर / Core</b>                                        |                                                     |
| Deployment Location                                      | Offsite                                             |
| Category of financial advisory service                   | Tax Advisory                                        |
| Sub-category of Financial Advisory Services              | Filing GST , Filing TDS , Filing Income Tax Returns |
| Financial Advisory Reports                               | Yes                                                 |
| Frequency of Progress Report                             | Monthly                                             |
| Type of Professional/Resources required                  | Tax expert , GST expert , Chartered accountant      |
| Qualification of Professional/Resources required         | CA                                                  |
| Certification of Professional/Resources required         | Certified valuer by ICAI                            |
| Total Experience of Professionals / Resources (In years) | 3 - 5 Years                                         |
| <b>एडऑन /Addon(s)</b>                                    |                                                     |
| Post Financial Advisory Support                          | NA                                                  |

**क्रेता द्वारा निर्धारित न्यूनतम मूल्य/Minimum Floor Price defined by Buyer**

|                                                                            |    |
|----------------------------------------------------------------------------|----|
| क्रेता द्वारा निर्धारित न्यूनतम मूल्य/Minimum Floor Price defined by Buyer | No |
|----------------------------------------------------------------------------|----|

**अतिरिक्त विशिष्टि दस्तावेज़ /Additional Specification Documents****प्रेषिती/रिपोर्टिंग अधिकारी /Consignees/Reporting Officer and Quantity**

| क्र.सं./S.N<br>o. | प्रेषिती/रिपोर्टिंग<br>अधिकारी /Consignee<br>Reporting/Officer | पता/Address                                                       | Quantity                      | अतिरिक्त आवश्यकता<br>/Additional<br>Requirement |
|-------------------|----------------------------------------------------------------|-------------------------------------------------------------------|-------------------------------|-------------------------------------------------|
| 1                 | Shubham Kumar<br>Umarvaishya                                   | 400051,3rd Floor, 341,<br>Bhavishya Nidhi Bhavan,<br>Bandra East. | Project /<br>Lumpsum<br>Based | N/A                                             |

**क्रेता द्वारा जोड़ी गई बिड की विशेष शर्तें/Buyer Added Bid Specific Terms and Conditions****1. Generic**

OPTION CLAUSE 25% : The buyer can increase or decrease the contract quantity or contract duration up to 25 percent at the time of issue of the contract. However, once the contract is issued, the contract quantity or contract duration can only be increased up to 25 percent. Bidders are bound to accept the revised quantity or duration.

For lumpsum-based service contracts, the buyer may increase the scope of work and contract value up to 25 percent with the consent of the service provider

## 2. **Generic**

**Bidder financial standing:** The bidder should not be under liquidation, court receivership or similar proceedings, should not be bankrupt. Bidder to upload undertaking to this effect with bid.

## 3. **Service & Support**

AVAILABILITY OF OFFICE OF SERVICE PROVIDER: An office of the Service Provider must be located in the state of Consignee. DOCUMENTARY EVIDENCE TO BE SUBMITTED.

## 4. **Certificates**

Bidder's offer is liable to be rejected if they don't upload any of the certificates / documents sought in the Bid document, ATC and Corrigendum if any.

## 5. **Buyer Added Bid Specific ATC**

Buyer uploaded ATC document [Click here to view the file.](#)

## 6. **Service & Support**

Dedicated /toll Free Telephone No. for Service Support : BIDDER/OEM must have Dedicated/toll Free Telephone No. for Service Support.

## 7. **Payment**

**PAYMENT OF SALARIES AND WAGES:** Service Provider is required to pay Salaries / wages of contracted staff deployed at buyer location first i.e. on their own and then claim payment from Buyer alongwith all statutory documents like, PF, ESIC etc. as well as the bank statement of payment done to staff.

## अस्वीकरण/**Disclaimer**

The Additional Terms and Conditions (ATC) have been incorporated by the Buyer after approval of their Competent Authority. The Buyer, is solely responsible for the impact of these clauses on the bidding process, its outcome, and consequences thereof including any restriction arising in the bidding process due to these ATCs and including the modification of technical specifications and / or terms and conditions governing the bid. All representations / grievances pertaining to the ATC clauses shall be raised with the buyer organization directly and not with GeM. If any of the clause(s) is/are incorporated by the Buyer regarding the following, the bid & resultant contract shall be treated as null & void. Further, GeM reserves the right, at its sole discretion, to cancel the bid forthwith, without issuance of any prior notice or intimation :-

1. Publishing Custom / BOQ bids for items for which regular GeM categories are available (unless such Custom / BOQ item is bunched with the major regular product Category Item).
2. Mandating procurement of / from specific Brand / Make / Model / Manufacturer / Dealer except in case of Single Bid / Proprietary Article Certificate (PAC) Buying.
3. Inclusion of disqualification criteria related to suspension of seller / service provider, where such suspension period has already expired.
4. Mandating submission of documents (other than EMD and signed Integrity Pact - which can be submitted within 5 days of bid opening) in physical form as a pre-requisite to qualify bidders.
5. Publishing bids on GeM for procurement of works.
6. Procurement of Goods by creating a Service bid on GeM & vice-versa.
7. Seeking sample with bid or approval of samples during bid evaluation process. However, trial / sample, as the case may be, shall be permitted in cases where trial / sample are allowed as per approved and published procurement policy of the Buyers' controlling Ministry / Department / State / Public Sector Enterprises Headquarters. If there is any violation of trial / sample clause with regard to approved policy of the Buyers' Ministry / Department / State / Public Sector Enterprises Headquarters, then this is to be

determined and redressed by the concerned Buyer Organisation only.

8. Seeking experience from specific organization / department / institute only or from foreign / export experience.
9. Creating bid for items from incorrect categories.
10. Reference of conditions published on any external site or reference to external documents/clauses.
11. Asking for any Tender fee / Bid Participation fee, as the case may be.
12. Buyer added ATC Clauses which are in contravention of clauses defined in bid detail section, including specifications, EMD Detail, ePBG Detail and MII and MSE Purchase Preference sections of the bid, unless otherwise allowed by the applicable GeM GTC.
13. Any ATC clause in contravention with GeM GTC Clause 4 (xiii) (h) will be invalid. In case of multiple L1 bidders against a service bid, the buyer shall place the Contract by selection of a bidder amongst the L-1 bidders through a Random Algorithm executed by GeM system.
14. In a category based bid, adding additional items, through buyer added, additional scope of work/ additional terms and conditions/or any other document. If buyer needs more items along with the main item, the same must be added through bunching category based items or by bunching custom catalogues or bunching a BoQ with the main category based item, the same must not be done through ATC or Scope of Work.

Further, if any seller has any objection/grievance against these additional clauses or otherwise on any aspect of this bid, they can raise their representation against the same by using the Representation window provided in the bid details field in Seller dashboard after logging in as a seller. Buyer is duty bound to reply to all such representations and would not be allowed to open bids if he fails to reply to such representations.

**All GeM Sellers/Service Providers shall ensure full compliance with all applicable labour laws, including the provisions, rules, schemes and guidelines under the four Labour Codes i.e. the Code on Wages, 2019; the Industrial Relations Code, 2020; the Occupational Safety, Health and Working Conditions Code, 2020; and the Code on Social Security, 2020 as and when notified and brought into force by the Government of India.**

**For all provisions of the Labour Codes that are pending operationalisation through rules, schemes or notifications, the corresponding provisions of the pre-existing labour enactments (such as The Minimum Wages Act, 1948, The Payment of Wages Act, 1936, The Payment of Bonus Act, 1965, The Equal Remuneration Act, 1976, The Payment of Gratuity Act, 1972, etc. and relevant State Rules) shall continue to remain applicable.**

**The Seller/ Service Providers shall, therefore, be responsible for ensuring compliance under:**

- All notified and enforceable provisions of the new Labour Codes as mentioned hereinabove; and
- All operative provisions of the erstwhile Labour Laws until their complete substitution.

**All obligations relating to wages, social security, safety, working conditions, industrial relations etc. and any other statutory requirements shall be strictly met by the Seller/ Service Provider. Any non-compliance shall constitute a breach of the contract and shall entitle the Buyer to take appropriate action in accordance with the contract and applicable law.**

**This Bid is governed by the General Terms and Conditions, conditions stipulated in Bid and Service Level Agreement specific to the Service, as the case may be, as provided in the Marketplace.**

**However, in case of Service, if any condition specified in General Terms and Conditions is contradicted by the conditions stipulated in Service Level Agreement specific to said Service, then it will over-ride the conditions in the General Terms and Conditions.**

This Bid is governed by the [सामान्य नियम और शर्तें/General Terms and Conditions](#), conditions stipulated in Bid and [Service Level Agreement](#) specific to this Service as provided in the Marketplace. However in case if any condition specified in सामान्य नियम और शर्तें/General Terms and Conditions is contradicted by the conditions stipulated in Service Level Agreement, then it will over ride the conditions in the General Terms and Conditions.

जेम की सामान्य शर्तों के खंड 26 के संदर्भ में भारत के साथ भूमि सीमा साझा करने वाले देश के बिडर से खरीद पर प्रतिबंध के संबंध में भारत के साथ भूमि सीमा साझा करने वाले देश का कोई भी बिडर इस निविदा में बिड देने के लिए तभी पात्र होगा जब वह बिड देने वाला

सक्षम प्राधिकारी के पास पंजीकृत हो।बिड में भाग लेते समय बिडर को इसका अनुपालन करना होगा और कोई भी गलत घोषणा किए जाने व इसका अनुपालन न करने पर अनुबंध को तत्काल समाप्त करने और कानून के अनुसार आगे की कानूनी कार्रवाई का आधार होगा |/In terms of GeM GTC clause 26 regarding Restrictions on procurement from a bidder of a country which shares a land border with India, any bidder from a country which shares a land border with India will be eligible to bid in this tender only if the bidder is registered with the Competent Authority. While participating in bid, Bidder has to undertake compliance of this and any false declaration and non-compliance of this would be a ground for immediate termination of the contract and further legal action in accordance with the laws.

**---धन्यवाद/Thank You---**



Tender Notice for  
Notice Inviting Tender for Engagement of Chartered  
**Accountant Firm for Tax Work for FY 2026-27 & 2027-2028**



**OFFICE OF EPFO, REGIONAL OFFICE, MUMBAI-NARIMAN POINT**

Tenders for “SELECTION OF AGENCY FOR Engagement of Chartered Accountant Firm for Tax Work” for FY 2026-27 & 2027-2028.

The tender documents along with the instructions and Terms and Conditions are available on GeM portal. The prospective bidders are advised to check the eligibility criteria thoroughly before applying for the Tender.

The decision upon the bids received shall be communicated to the bidders through email only, if required. This office reserves the Right to amend/withdraw any of the Terms and Conditions in the Tender Document or to reject any or whole tender without giving any notice or assigning any reasons. The decision of the Regional PF Commissioner-I, Regional Office, Mumbai-Nariman Point in this regard shall be final and binding on all bidders.

## **INSTRUCTIONS TO THE BIDDERS**

### **ATC & Scope of Work for Hiring Services of Chartered Accountant Firm**

#### **SCOPE OF WORK (Direct Tax): -**

##### **A)**      Related to Income Tax-TDS, Contractor TDS and GST-TDS,

|    |                                                                                                                                                                                                                                                             |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | To ensure compliance of timely E-filing of all the returns pertaining to Income Tax-TDS, GST-TDS including E-filing of quarterly TDS returns pertaining to income tax deducted from salaries and TDS deducted from contractors. (24Q and 26Q, GST-TDS file) |
| 2. | Feeding of data of I-Tax deduction of employees/pensioners/contractors/GST-TDS.                                                                                                                                                                             |
| 3. | Data for filing aforesaid return will be provided by EPFO, RO- MUMBAI-NARIMAN POINT through soft copy/hard copy as required.                                                                                                                                |
| 4. | To ensure timely generation of Form-16 (Part A & Part B) in r/o 24Q, Form 16(A) in r/o 26Q and Generation of GST-TDS Challan or any other document mandatory required under aforesaid activities.                                                           |
| 5. | Timely filing of correction/rectification/revision in monthly/quarterly returns in case of any incorrect entry or invalid/wrong PANs /GST Numbers or any other kind of error in any return of Income Tax-TDS, Contractor TDS and GST-TDS.                   |
| 6. | Appearing before the Income Tax/GST Authorities on case to case and providing assistance to file reply of Notice of Income Tax-TDS, GST-TDS and GST matters as and when required.                                                                           |
| 7. | <b>Any other work</b> related to Income Tax which is not explicitly mentioned in the scope of work or may be introduced by the Government due to changes in the Taxation laws etc. will form the part of the scope of work.                                 |
| 8. | Any other work related to Income Tax as assigned by EPFO whether or not it pertains to the period of engagement of the firm/consultant.                                                                                                                     |
| 9. | Any other work related to Income Tax as assigned by EPFO whether or not it pertains to the period of engagement of the firm/consultant.                                                                                                                     |

**B) ADDITIONAL TERMS & CONDITIONS (ATC) FOR SUBMISSION OF BID: -**

|     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 01. | The Chartered Accountant firm must be registered with the Institute of Chartered Accountants of India (ICAI). Self-attested valid copy of CA certificate should be enclosed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 02. | The tender is not transferable.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 03. | The firm should have at least <b>05 Years (Five Years)</b> experience of providing similar taxation service to Central Govt. Departments/State Govt./Autonomous Bodies. <b>(Please attach Proof)</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 04. | Turnover of firm providing such services should not be less than <b>05 lakh per annum</b> for the last three years i.e. for 2023-24, 2024-25 and 2025-26. <b>(Please attach Proof)</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 05. | The firm hold has their active and fully functional office or branch in Mumbai <b>(The proof of address is to be attached with the Technical Bid documents)</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 06. | The firm should have registered in GST <b>(Please attach Proof)</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 07. | Initially the contract will be for a period of <b>Two Year</b> which will be extendable to the 3 <sup>rd</sup> year <b>(will be renewed on same term &amp; condition and rates)</b> depending upon the satisfactory performance of the Firm.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 08. | The rate should be quoted as lump sum per month for all activities mentioned in scope of work (exclusive GST).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 09. | Any other work related to Income Tax as assigned by EPFO, RO- MUMBAI-NARIMAN POINT whether or not it pertains to the period of engagement of the firm/consultant.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 10. | An undertaking that the Agency/company/firm is not blacklisted by any EPFO/Instt. Or any other Govt. Department.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 11. | The lowest quoting firm will be given preference over others. However, Assistant PF Commissioner, RO, Mumbai- Nariman Point reserves the right to reject all or even the lowest quotation without assigning any reason.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 12. | Assistant PF Commissioner, RO, Mumbai- Nariman Point may terminate the contract of the selected firm on account of unsatisfactory service by giving a notice of one month.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 13. | <b>Earnest Money:-</b> The tenderer needs to deposit an Earnest Money Deposit of <b>Rs. 2,000/-</b> (Rupees Two Thousand only) in the form of RTGS/NEFT in favour of <b>“Regional PF Commissioner, Bandra”</b> from any scheduled commercial Bank. If the successful tenderer declines to act on the offer made by the EPFO and/or withdraw/amend their quotations after opening of tenders, the EMD shall stand forfeited without any notice to the tenderer and no claim on this account shall be entertained. The EMD of unsuccessful tenderers shall be returned/refunded after finalization of the contract. <b>Exemption as per GeM for MSEs/MSMEs Firms will apply.</b> A certificate in this regard may be attached. |
| 14. | Visit of the consultant/authorised staff once or more in a month to guide on Income Tax related matters. No TA/DA etc. will be paid for this.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 15. | During the contract period, <b>no increase</b> whatsoever will be given other than quoted rates.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 16. | <b>Performance Security Deposit: -</b> The selected firm shall have to enter into an agreement before work and submit a <b>5% performance security</b> of total value of contract. In the form of <b>RTGS/NEFT/DD</b> in favor of <b>“Regional PF Commissioner, Bandra”</b> have to be deposited by the successful bidder within 15 days of intimation of award of contract.                                                                                                                                                                                                                                                                                                                                                 |

|     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 17. | <b>Forfeiture of Performance Security Deposit:-</b> The performance security can be forfeited by order of the competent authority in event of any breach of negligence or non-observance of any terms/condition of contract or for unsatisfactory performance or for non-acceptance of the work order. On expiry of the contract, such portion of the said performance security as may be considered by this office, sufficient to cover any incorrect or excess payments made on the bills to firm, shall be retained until the final audit report on the account of firm's bill has been received and examined. |
| 18. | <b>Penalties:-</b><br>(i) If the quarterly/monthly TDS, GST-TDS reports provided by this Institute to the firm are not filed                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

|     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|     | by the firm on time, then the penalty imposed on it by the Income Tax Department can be recovered from its bill.<br>(ii) The competent authority shall be at liberty to withhold any of the payments in full or in part subject to recovery of penalties mentioned in preceding paragraph.<br>(iii) No payment shall be made to contractor/firm if service provided by him is unsatisfactory.                                                                                                                                                                                                                                                                                                                                                                                              |
| 19. | <b>Terms of payment:-</b><br>(i) Payment will be released on <b>quarterly</b> basis to the Consulting firm and TDS will be deducted as per rule from the bill.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 20. | <b>Breach of Terms and Conditions:-</b> In case of breach of any of terms & conditions mentioned in this NIT, the Competent Authority will have the right to cancel the contract without assigning any reason thereof, and nothing will be payable by this office in that event and performance security deposit in the form of RTGS/NEFT shall be encashed / forfeited including blacklisting of the contractor/firm for a period as decided by the Competent Authority.                                                                                                                                                                                                                                                                                                                  |
| 21. | <b>Sub-letting of Work</b> to any other CA firm/person is not allowed under any circumstances.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 22. | <b>Firm</b> shall be <b>solemnly responsible</b> for payment of wages/salaries other benefit and allowances to his/her <b>personnel</b> that might become applicable under any Act or Order of the Government. EPFO shall have no liability whatsoever in this regard.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 23. | EPFO will debar the parties from tendering having relatives working in EPFO. A non-relationship Certificates in the proforma provided in the <b>Annexure-II</b> is required to be submitted.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 24. | Bid Notice and the General Terms & Conditions shall form the part of the Contract.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 25. | <b>Settlement of dispute:-</b><br>(a) In the event of any question/dispute/difference arising under the agreement or in connection herewith (except as to matters the decision of which is specially provided under the agreement) the same shall be referred to the Mumbai International Arbitration Centre for appointment of Arbitrator to adjudicate the dispute.<br>(b) The award of the Arbitrator shall be final and binding on the parties. The Arbitrator may give interim award(s) and/or directions, as may be required.<br>(c) Subject to aforesaid provision, the Arbitration and Conciliation Act, 1996 and the rules made hereunder and any modification thereof from time to time being in force shall be deemed to apply to the arbitration proceeding under this clause. |
| 26. | <b>Legal proceedings :-</b><br>Legal proceedings, if any, will be subjected to the jurisdiction of the courts in Mumbai only.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

**Technical Bid Documents**

Name of Work: - “Annual Contract for Hiring Services of Chartered Accountant Firm”

**DETAILED STATUS OF THE FIRM PROFILE OF CHARTERED ACCOUNTANT FIRM**

| SR. | PARTICULARS REQUIRED                                                                               | PARTICULARS GIVEN | *PAGE No. |
|-----|----------------------------------------------------------------------------------------------------|-------------------|-----------|
| I   | II                                                                                                 | III               | IV        |
| 01  | Name of the Firm                                                                                   |                   |           |
| 02  | CA Registration No. (Attach Copy of Reg. Certificate of ICAI)                                      |                   |           |
| 03  | PAN No. (Attach Copy of PAN Card)                                                                  |                   |           |
| 04  | GST Registration Certificate ( Attach Copy)                                                        |                   |           |
| 05  | MSEs/MSMEs Certificate (if any as per GeM) (Attach Copy)                                           |                   |           |
| 06  | Annual Turnover Rs.5,00,000 (Attach Copy F.Y. 2023-24, 2024-25, 2025-26)                           |                   |           |
| 07  | Experience 05 year (Attach Copy)                                                                   |                   |           |
| 08  | Whether firm has its own office at Mumbai.<br>(Attach valid address proof in the name of the firm) |                   |           |
| 09  | RTGS/NEFT Details of the firm to be enclosed.                                                      |                   |           |
| 10  | Email address for all official communications                                                      |                   |           |
| 11  | Mobile Nos. of authorized persons                                                                  |                   |           |
| 12  | All enclosed Annexure should be duly filled & signed on company letter head.                       |                   |           |
| 13  | Full ATC should be uploaded with duly signed on every page.                                        |                   |           |
| 14  | Any other information, if any.                                                                     |                   |           |

**\*Indicating page number in column No. IV above is mandatory.**

Declaration by the bidder: -

This is to certify that I/We before signing his tender and quoting the rates have fully understood all the terms and conditions, scope of work and undertake myself/over selves to abide by them.

(Signature)  
WITH SEAL

Authorised Signatory

Dated:

**Condition of Financial Bid:-**

|    |                                                                                                                                                                                                                                                                                                                      |
|----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | The bidder should Quote lump sum amount (In Rs.) per month on GeM portal for all work (which is mentioned in scope of work).                                                                                                                                                                                         |
| 2. | <b>The quote will be treated as invalid/unresponsive, if item wise rates are quoted.</b> Only a single lump sum amount per month which shall remain valid for contract period for all works as per scope of work.                                                                                                    |
| 3. | <p>a) <b>Firm quoting lowest overall will be treated as `L1` firm.</b></p> <p>b) If there is a mismatch in Rate in Figures and rate in Words, then the Rate in Words will be taken as the Quoted Rate.</p> <p><u>Note:</u></p> <p>a) <b>Rates <u>must be inclusive of all types of charges (except GST).</u></b></p> |
| 4. | <p>If the quoted rates of two/more firms are same, then L1 firm will be decided on the basis of below mentioned criteria and order: -</p> <p>a) Higher relevant experience (if both quoted rates are same)</p> <p>b) Nearby distance of office (applicable only if (a) not fulfil)</p>                               |
| 5. | The firm should not devise their own format or lay down any other conditions except lump sum amount. Conditional quotes are liable to be rejected.                                                                                                                                                                   |
| 6. | Applicable Taxes i.e. GST, shall be paid extra, on reimbursement basis.                                                                                                                                                                                                                                              |
| 7. | The authorized officer of the firm should sign and stamp the pages of this letter and submit the complete tender/quotation may be submitted online on <a href="https://gem.gov.in">https://gem.gov.in</a>                                                                                                            |

(Signature)

Authorised  
Signatory WITH  
STAMP

**Self-Declaration****(To be given on Company Letter Head)**

1. I \_\_\_\_\_ son/daughter/wife of Sh. \_\_\_\_\_ and Proprietor/Director/authorized signatory of the agency mentioned above, is competent to sign this declaration and execute this tender document.
2. I have carefully read and understood all the terms and conditions of the tender and undertake to abide by them.
3. The information/documents furnished along with the above application are true and authentic to the best of my knowledge and belief. I/we, am /are well aware of the fact that furnishing of any false information/fabricated document would lead to rejection of my/our tender at any stage besides liabilities towards prosecution under appropriate law and forfeiture of EMD or Performance Guarantee as the case may be.

Date :

Place :

Signature of authorized

person FULL NAME:

**None of my relative working declaration (To be given on Company Letter Head)**

I \_\_\_\_\_ S/o \_\_\_\_\_  
R/o \_\_\_\_\_ hereby certify that **none** of my **relative(s)** is/ are  
employed in EPFO as per details given in tender document.

In case at any stage, if it is found that the information given by me is false /  
incorrect, EPFO shall have the absolute right to take any action deemed fit without any prior  
intimation to me.

DATE:

TENDERER'S SIGNATURE

OFFICIAL STAMP:

Signature of the bidder with seal



Format for declaration in LIEU of EMD/BID SECURITY

(To be submitted on the Bidder's Letter Head)

Applicable for the MSEs/MSMEs category only

it is here by submitted that if, I/We (name of Bidder/firm/company) withdraw or modify the bids during period of validity, or if I/We awarded the contract and I/We \_\_\_\_\_ (name of Bidder/firm/company) fail to sign the contract/agreement or to submit a performance security in the shape of NEFT/RTGS, before the deadline defined in the tender/bid documents (within 15 days of work award letter), I/We \_\_\_\_\_ (name of Bidder/firm/company) suspended to take part in **EPFO** Tender/Bid process for the period of **05 years** from the date of occurrence of the above mentioned default.

Date:

Authorized Signatory Name & Seal

**ANNEXURE-IV**

**Non-Black listing declaration**  
**(To be given on Company Letter Head)**

Date:

To,

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Sub: Declaration for Non-Blacklisting

Tender Reference No: \_\_\_\_\_

Name of Tender/Work:- \_\_\_\_\_

Dear Sir/Madam,

We hereby declare that we are not blacklisted by any Central/ State Government/ agency of Central/ State Government of India or any other country in the world/ Public Sector Undertaking/ any Regulatory Authorities in India or any other country in the world for any kind of fraudulent activities.

Yours Faithfully,

(Signature of the Bidder)

With Official Seal

## **ANNEXURE-V**

**(To be in the Company letter head)**

**Date:** \_\_\_\_\_

### **DECLARATION & UNDERTAKING BY MSEs/MSMEs ENTERPRISES COMPANIES:**

**The following declaration should be given by MSEs/MSMEs at the time of tender submission:**

In terms of Tender Conditions applicable for Micro & Small Enterprises (MSEs)/MSMEs we hereby declare as under-

- (a) I/We are a Micro/Small Enterprise, as on bid closing date of this tender.
- (b) I/We are a Manufacturer of the quoted supply item(s)/ service provider for quoted services and valid documentary evidence for same is submitted.
- (c) MSE certificate submitted by us is authentic & valid as on bid closing date of this tender.

I/We declare the above details are true. In case any of the details are found to be false /untrue, our offer will be liable for rejection/cancellation of order/subjected to appropriate actions as per tender Terms & Conditions.

**Authorized Signatory  
(With Company seal &**

**Documents to be submitted along with the bid, wherever applicable.**

| Sl. No. | Document                                                                                                                                          | Remarks                                  |
|---------|---------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|
| 1       | Name, Address, Contact details (Mobile/Landline No.) etc. of the Firm on the letter head.                                                         | Annexure A                               |
| 2       | MSME/MSE Certificate, wherever applicable.                                                                                                        |                                          |
| 3       | Experience Certificate.                                                                                                                           |                                          |
| 4       | PAN Card issued by IT Department of the Firm.                                                                                                     |                                          |
| 5       | ITR for the last three years 2023-2024, 2024-2025 & 2025-26.                                                                                      |                                          |
| 6       | GST Registration Certificate of the Firm                                                                                                          |                                          |
| 7       | Registration Certificate of the firm/company/proprietorship                                                                                       |                                          |
| 8       | The bidder should not have been blacklisted by any Govt. Authority or public sector undertaking (undertaking need to be submitted) by the bidder. | ANNEXURE – B                             |
| 9       | Each and every page of the attached documents should be signed & stamped by authorized person.                                                    |                                          |
| 10      | Bidder Financial Standing                                                                                                                         | ANNEXURE – C                             |
| 11.     | Acceptance of Terms and Conditions of Bid and ATC                                                                                                 | ANNEXURE – D                             |
| 12      | Escalation Matrix                                                                                                                                 | On the original letterhead of the Bidder |
| 13.     | Institute of Chartered Accountants of India (ICAI). Self-attested valid copy of CA certificate                                                    |                                          |
| 14      | Bid Security Declaration                                                                                                                          | Annexure – E                             |
| 15      | Supporting document of Active and fully functional office or branch in Mumbai.                                                                    |                                          |
| 16      | Chartered Accountant Audited Turnover for the last three years 2023-2024, 2024-2025 & 2025-26.                                                    |                                          |

[On the original letterhead of the Bidder]

**ANNEXURE –A**

**DETAILS OF THE FIRM**

| <b><u>Sl.</u></b> | <b><u>Particulars</u></b>                | <b><u>Details</u></b> |
|-------------------|------------------------------------------|-----------------------|
| 1.                | Name of Company / Firm/ Institution      |                       |
| 2.                | Name of Owner / Partners / Directors     |                       |
| 3.                | Name & Signature of Authorized signatory |                       |
| 3.                | <b>FIRM DETAILS</b>                      |                       |
|                   | (a) Office Address                       |                       |
|                   | (b) Telephone No.                        |                       |
|                   | (c) Fax No.                              |                       |
|                   | (d) e-mail id                            |                       |
| 4.                | <b>FIRM REGISTRATION DETAILS</b>         |                       |
|                   | (a) Registration No. of firm with ICAI   |                       |
|                   | (b) PAN No.                              |                       |
|                   | (c) GST Registration No. (if applicable) |                       |
|                   | (e) TAN No.                              |                       |
| 5.                | <b>Details of Firm's Bankers</b>         |                       |
|                   | Name & Address of the Bank               |                       |
|                   | (a) IFSC No.                             |                       |
|                   | (b) Account No. of the Firm              |                       |
|                   | (c)                                      |                       |

(Proof to be attached for all above information failing which the tender will be treated as invalid/incomplete)

\*Please use additional sheet for more details, if necessary.

Date :

Place :

Signature of tenderer with seal  
(With Name and Designation of Appropriate Authority)

[On the original letterhead of the Bidder]

**ANNEXURE – B**

**CERTIFICATE**

**DECLARATION REGARDING BLACKLISTING/NON-BLACKLISTING**

I /We Proprietor / Partner (s) / Director (s) of M/s ..... hereby declare that the firm/ company namely M/S ..... has not been blacklisted or debarred in the past by any organization from taking part in Government tenders.

Or

I / We proprietor / partner (s) / Director (s) of M/S..... hereby declare that the firm/ company namely M/S.....was blacklisted or debarred by any Government Department from taking part in Government tenders for a period of .....years w.e.f. .... the period over on..... And now the firm/ company is entitled to take part in Government tender. In case the above information found false I / we are fully aware that the tender/ contract will be rejected / cancelled by Regional Director, ESIC Regional Office, Patna shall be forfeited. In addition to the above Dean, ESIC Regional Office, Patna, will not be responsible to pay the bills for any completed/ partially completed work.

In case of proprietorship firm, certificate will be given by the proprietor, and in case of partnership firm, certificate will be given by all the partners and in case of limited company by all the Directors of the company or company secretary on behalf of all directors.

Dated, this ..... day of .....2026

Authorized Signatory (signature in full): \_\_\_\_\_

Name and Title of Signatory: \_\_\_\_\_

Company Rubber Stamp: \_\_\_\_\_

[On the letterhead of the Bidder/Contractor]

**ANNEXURE – C**

**Self-Declaration on Non-Bankruptcy and non-Insolvency**

I /We Proprietor / Partner (s) / Director (s) of M/s ..... the firm/  
company namely M/S.....do here by solemnly  
declare that we are neither in any way Insolvent, Bankrupt or Defaulter in terms of rules & regulations  
presently invoke in India. In case of any such event is found during bids evaluation and award of  
contract, I/We have no objection if my/our tender is rejected.

Dated, this ..... day of .....2026

Authorized Signatory (signature in full): \_\_\_\_\_

Name and Title of Signatory: \_\_\_\_\_

Company Rubber Stamp: \_\_\_\_\_

[On the original letterhead of the Bidder]

**ANNEXURE – D**

**DECLARATION**

I, \_\_\_\_\_ Son/Daughter/Wife of \_\_\_\_\_  
Resident of \_\_\_\_\_ Proprietor /  
Director / Authorized Signatory of the Company / Firm, mentioned above, is competent to sign this  
declaration and execute this tender document.

I/We hereby certify that I/We have read the entire terms and conditions of the tender documents  
(including all documents like annexure(s), schedules(s), etc.,) which form part of the contract  
agreement and I/We shall abide hereby by the terms / conditions / clauses contained therein.

The information / documents furnished along with the above application are true and authentic to the  
best of my knowledge and belief. I / we are well aware of the fact that furnishing of any false  
information / fabricated document would lead to rejection of my tender at any stage besides liabilities  
towards prosecution under appropriate law.

The corrigendum(s) issued from time to time by your department/organization too have all been taken  
into consideration, while submitting this declaration letter.

I/We hereby unconditionally accept the tender conditions of above-mentioned tender document(s) in  
its totality / entirety.

In case any provision of this tender is found violated, then your department/organization shall without  
prejudice to any other right or remedy be at liberty to reject this tender/bid.

Dated, this ..... day of ..... 2026

Authorized Signatory (signature in full): \_\_\_\_\_

Name and Title of Signatory: \_\_\_\_\_

Company Rubber Stamp: \_\_\_\_\_



[On the letterhead of the Bidder]

**ANNEXURE – E**

**BID SECURITY DECLARATION FORM**

I/We.....certify that I/We will not withdraw or modify the bid during the period of validity in the case of award of the contract. I/We will sign the contract and submit the performance security (if any) before the deadline defined in the request of bid document. In the case of failure to do so, I/We will be debarred for a period of 02 years' from being eligible to submit bids with EPFO, Regional Office, Mumbai-Nariman Point.

Signed:

In the capacity of:

Name:

Duly authorized to sign the bid for an of behalf of

Dated, this ..... day of .....2026

Authorized Signatory (signature in full): Name and Title of Signatory:

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Company Rubber Stamp: \_\_\_\_\_