



BHARAT HEAVY ELECTRICALS LIMITED
HEAVY PLATES & VESSELS PLANT
VISAKHAPATNAM – 530 012,
ANDHRA PRADESH, INDIA.

NOTICE INVITING TENDER

For conducting Impact Assessment of BHEL Corporate Social Responsibility (CSR) Project Titled “ **MARKET** (Motivating AgRarian Communities for Kandhamal).” for the welfare of Tribal community in Odisha.

Bharat Heavy Electricals Limited (BHEL) is a Maharatna PSU & is India's largest Engineering and manufacturing Company engaged in the design, engineering, manufacture, construction testing, commissioning, and servicing of wide range of products, systems and services for the core sectors of the economy viz Power, Transmission, Industry, Transportation, Renewable energy, Oil and gas and Defence

As per BHEL's CSR Policy and CSR Amendment Rules, CSR projects which have completed one year, require to undertake the Impact Assessment. In view of this, HPVP Unit being Nodal Unit for implementation of this project, intends to conduct a third-party impact assessment study of its CSR Project (briefed in Annexure-A).

Tender bids are invited for conducting Impact Assessment of the said CSR project.

Last date for submission of Tender : Date: 21.01.2025 time: 2.00 PM

Opening of Techno commercial bid : Date: 21.01.2025 time: 3.00 PM

Opening of Price bid : To be informed to techno-commercially qualified bidder

Impact Assessment study**a) Objective of the Impact Assessment Study:**

Assessment Criteria	Assessment Questions
Relevance	<ol style="list-style-type: none"> 1. Did the overall goal match needs of the project area and surrounding? 2. Did the project's baseline data correctly addressed needs of the area?
Efficiency	<ol style="list-style-type: none"> 1. What outputs were achieved and whether they were according to the plan? 2. Was the implementation schedule as planned? 3. Was the project cost within planned limit? 4. Was the fund utilization prudent?
Effectiveness & Uniqueness	<ol style="list-style-type: none"> 1. Did the outputs help achieve the goal? 2. Did the project have any unique feature? 3. Comparing the inputs to the extent of goals achieved, can project implementation be considered to be effective? 4. Can the project be replicated?
Impact	<ol style="list-style-type: none"> 1. What were the various tangible and intangible positive and/or negative impacts (Socio-economic, Environment, Policy, Technology, Awareness) on different stakeholders of the project?
Sustainability	<ol style="list-style-type: none"> 1. Would the impacts created by the project sustain? 2. Considering the present course of project, is the project sustainable?

b) Impact Assessment report shall also apart from above mentioned Assessment Questions (mentioned at a) cover the following:

1. Objective of the Project.
2. Whether objective met. If yes, then to what extent.
3. Outcome of the project based on the conclusion of Baseline Indicators
4. Expected impacts in the long run.
5. Tangible and Intangible benefits derived from project.
6. Methodology, Coverage and Sampling Plan

i)	The selected agency has to visit the Site and interact with various stakeholders (beneficiaries, project implementation agency and their representatives, BHEL's CSR co-coordinators, public authorities etc.) for the purpose of study. The agency would design actual sampling plan, as per the demand/nature of the project
ii)	Agency has to submit a brief research proposal and questionnaire, describing the proposed research methodology to be adopted including methods and tools to be used for data collection, manpower requirements defined for the study, keeping in view geographical distribution of samples.

Sample size:

Subjected project is “achieving Economic prosperity of 10000 small and marginal farmers through adoption of APC approach in Kandhamal District of Odisha”.

The agency shall make a sample of at least 3000 farmers/House Holds who were benefitted from the Project covering all geographical locations/villages etc under the project.

Agency shall provide their questionnaire to the selected sample of beneficiaries and shall collect relevant information/data as per it. Beneficiaries might be literate or illiterate. Agency shall provide assistance in understanding the questionnaire as well as the purpose behind it in local language understood by them.

iii)

- c) **Eligibility of Agency for carrying out Impact Assessment study: Techno-commercial**
Evaluation would be done as per Annexure B. Documents in support of their evaluation as per the annexure shall be required by the bidder. List of documents adhered shall be as per Annexure-H.

The Agency applying to carry out Impact Assessment must fulfil the following conditions:

1. The Agency may be a Government Undertaking / Registered Company / Registered Consultancy Firm / Registered Non-Government Organization / Academic Institution, specializing in conducting Impact Assessment.
2. The Agency must have a minimum of **three years' experience** of carrying out Impact Assessment in the domain of Corporate Social Responsibility/ Sustainability Services/ Community Development Projects financed by any Central Ministry/ World Bank/ NABARD and/or other international donor institution (e.g., ADB, EU etc) or Central / State Public Sector Enterprise.
3. Leader/head leading the team of impact assessment study must have post **graduate qualification** specialised in Social Science/Economics/ Management/Project research/Math/Statistics/Philosophy/Social Works as part of the curriculum and must have experience of **at least 3 years**.

d) Person to be contacted for clarification if any

Ms. Leela S, AGM (HR),
BHEL-HPVP, Admin Building
BHPV PO,
Dist. Visakhapatnam, PIN-530012; AP
Email: lsudarsi@bhel.in : Phone: 0891-2881810

e) Evaluation Process for techno-commercial qualification:

Based on the documents submitted, the techno-commercial & financial capability of the participating agencies shall be evaluated as per evaluation methodology indicated in **Annexure-B**.

f) Evaluation Process for Price bid

- 1 Price bid of only techno-commercially qualified bidders will be opened. If it is found that, price bid is not clearly signed and sealed by competent person of the agency, it would be rejected. Conditional price bid will be rejected out rightly.
- 2 Accepted bid which quotes lowest price in the format of price bid **Annexure C** will be termed as L1 (Lowest) or successful bidder. The work order would be issued to successful bidder.
- 3 In case of tie in price bid, agency scoring more marks in **Annexure B** will be given preference.

g) Time Schedule

The total exercise has to be completed within a period of 45 days from the date of start of work (date of issue of work order)

S.N.	Activity	Duration in Days
1	Study of the Project by the agency – its nature, area of operation, etc.	Within a period of maximum of 45 Days
2	Preparation & submission of evaluation materials , sampling method and action plan	
3	Pre-testing, adjustment of evaluation materials/ and Pilot testing	
4	Site movement, Data Collection	
5	Data Entry, Compilation, Processing and data Analysis	
6	Submission of 1st Draft to BHEL	
7	Preparation, submission and acceptance of final report after receiving the comments from BHEL	

h) Payment terms:

The payment shall be made to the successful bidder who will conduct the impact assessment through **EFT**, as per the following norms:

Sr.No.	Milestone	% of fund to be released
1	Submission of Impact assessment Methodology approved by competent authority duly recommended by CSR committee.	10%
2	Submission of 1 st Draft / Interim Report	40%
3	Submission of Final Report approved by competent authority duly recommended by CSR committee.	50%

The successful bidder should give **EFT** details (account verified by the concerned Bank official) along with cancelled/crossed original cheque.

Payment will be released only through RTGS/ NEFT within 45 days for MSE/60 Days for medium/90 days for Large Enterprises. All documents required for the same as specified are to be submitted by contractor along with the bill.

i) BHEL Rights:

1. BHEL reserves the right to Ask for further clarifications during techno commercial scrutiny of bids received
2. BHEL shall not be responsible for any delay, loss, damage for bids sent by post/courier/hand. Damaged or improperly sealed bid shall not be accepted.
3. Bids reached after the due time/date shall not be accepted.
4. Canvassing i.e. soliciting favour, seeking advantage etc. in any form is strictly prohibited and any bidder found to be engaged in canvassing shall be liable for rejection of its bids.
5. If the bidder deliberately gives any wrong information in the tender to create any circumstances for the acceptance to its bid, BHEL reserves the right to reject such bids. Action would be taken as per Rules.

j) Arbitration:

Any disputes on both sides to be referred to Head HR of HPVP (BHEL), for settlement, who will be the final authority.

k) Security Deposit:

- A. Security deposit means the security provided by the contractor towards fulfilment of any obligations in terms of the provisions of the contract.
- B. The total amount of the security deposit will be **5% of the contract value**.
- C. Modes of Deposit:

The balance amount to make up the required Security Deposit of **5%** of the contract value may be accepted in the following forms:

- i) Cash (as permissible under the extant Income Tax Act)
- ii) Local Cheques of Scheduled Banks (subject to realization)/ Pay Order/ Demand Draft/ Electronic Fund Transfer in favour of BHEL.
- iii) Bank Guarantee from Scheduled Banks/ Public Financial Institutions as defined in the company's act. The bank guarantee format should have the approval of BHEL.
- iv) Fixed Deposit Receipt issued by Scheduled Banks/ Public Financial Institutions as defined in the company's act (FDR should be in the name of the contractor, a/c BHEL).
- v) Securities available from Indian Post offices such as National Savings Certificates, Kisan Vikas Patras etc. (held in the name of Contractor furnishing the security and duly endorsed/ hypothecated/ pledged, as applicable, in favour of BHEL)

(Note: BHEL will not be liable or responsible in any manner for the collection of interest or renewal of the documents or in any other matter connected therewith)

D. Collection of Security deposit:

At least 50% of the required security deposit, should be submitted before start of the work. Balance security deposit can be collected by deducting 10% of the gross amount progressively from each of the running bills of the contractor till the total amount of the required security deposit is collected. Security deposit shall be released to the contractor upon fulfilment of contractual obligations as per the terms of the contract.

E. Refund of Security Deposit:

- i) The security deposit shall be refunded after successful completion of the Contract as per agreement and subject to deduction of any amount due to BHEL.
 - ii) Security deposit shall not be refunded to the Contractor except in accordance with the terms of the Contract.
- F.** The successful tenderers shall furnish Security Deposit within 15 days from the date of Work Order / Letter of Intent. The Security Deposit shall be furnished by the successful tenderers before commencement of work by them.
- G.** The security deposit shall not carry any interest.

Note: Acceptance of Security Deposit against Sl. No. C(iv) and (v) above will be subject to hypothecation or endorsement on the documents in favour of BHEL. However, BHEL will not be liable or responsible in any manner for the collection of interest or renewal of the documents or in any other matter connected therewith.

- H.** Security Deposit / Bank Guarantee will be released after the maintenance period of 2 months or on closure of contract whichever is later.
- I. Bidder shall agree to submit performance security required for execution of the contract within the time period mentioned. In case of delay in submission of performance security, enhanced performance security which would include interest (repo rate +4%) for the delayed period, shall be submitted by the bidder. Further if performance security is not submitted till such time the first RA bill becomes due, the amount of performance security due shall be recovered as per terms defined in NIT / contract, from the bills along with due interest.**

L. INCOME TAX

Income tax as per statutory requirement will be deducted on each payment made to the contractor and TDS certificate will be issued to this effect.

M. TDS ON GST:

TDS on GST amount as per statutory requirement as applicable will be deducted on each payment made to the contractor. Present TDS on GST is 2%.

Brief of the PSNR CSR Project

Name of the Project:

“ **MARKET** (Motivating AgRarian Communities for Kandhamal).” for the welfare of Tribal community in Odisha.

Implementing Agency:

PRADAN – Professional Assistance for Development Action, Regn No: D/13434, Address: 3, Community Shopping Centre, Niti Bagh, New Delhi-110049.

Year of implementation: 23/10/2020 to 22/10/2023

Beneficiaries: All the 10000 small and marginal farmers in Kandhamal District of Odisha”.

Annexure-B**Techno-commercial Evaluation Criteria:**

<u>SN</u>	<u>Particulars</u>	<u>Max Mark</u>	<u>Marks obtained</u>	<u>Evaluation basis</u>
<u>1</u>	Total Number of years' experience of the Agency	<u>5</u>		If date of registration is not prior 5 years from date of NIT: 0 marks. If date of registration is prior 5 years from date of NIT: 5 marks. Agency should submit the registration/incorporation certificate.
<u>2</u>	Past experience in carrying out Impact Assessment/ Evaluation in domain of CSR/ Sustainability / Community Deve. Projects of other corporate/PSU and/or deve. projects financed by any Central Ministry/ World Bank/ NABARD / other international donor (e.g., ADB, UN, etc)	<u>40</u>		(2.1 + 2.2)
<u>2.1</u>	Experience in term of Years	<u>20</u>		If experience is less than 3 years: 0 marks. If experience is between 3 to 5 year: 10 marks. If experience is 5 years or more: 20 mark. Agency should submit at least 1 work order/letter from client confirming its experience as a proof
<u>2.2</u>	Experience in term of number of project/assignment on assessment done	<u>20</u>		If agency has executed less than 3 nos of assignment on assessment: 0 marks. If agency has executed 3 or more number of assignment on assessment: 20 marks. Agency should submit Completion report/letter from client confirming that agency have experience of 3 years
<u>3</u>	Experience of Key personnel	<u>40</u>		(3.1+3.2)
<u>3.1</u>	Qualifications:	<u>20</u>		If team leader/head is not having at least PG qualification: 0 marks If team leader/head is having at least PG qualification: 20 marks Agency should submit the CV of key person and PG degree certificate copy as a proof

<u>3.2</u>	Relevant Experience of team leader in term of year	<u>20</u>		<p>If team leader/head is not having at least 3 years' experience: 0 marks</p> <p>If team leader/head is having at 3 years' experience: 20 marks</p> <p>Agency should submit the declaration in support of this</p>
<u>4</u>	Financial Strength	<u>15</u>		(4.1+4.2)
<u>4.1</u>	Average Annual Income (PAT) of last three Years whose audited report submitted as per SN 9 of Annexure D	<u>10</u>		<p>If Less than Rs. 5 Lakhs : 0 Mark</p> <p>If in between Rs.5 lakh to 10 Lakhs: 5 Marks</p> <p>If more than 10 Lakhs: 10 Marks</p>
<u>4.2</u>	Net Worth	<u>05</u>		<p>Negative net worth: 0 Marks</p> <p>Positive net worth: 5 Mark</p>
<u>5</u>	Total (1+2+3+4)	<u>100</u>		(1+2+3+4)

Agency would be evaluated as below:

- i. Agency scoring “0” in any of the column of SN 2 and SN 3 above; it would be techno-commercially disqualified.
- ii. If total marks obtained by Agency is **less than 50**; it would be techno-commercially disqualified.
- iii. Bids of techno-commercially disqualified agency won't be considered for further process of tender.

PRICE BID

Ref: NIT NO: HPVP: HRM: CSR: **A041** dated

S.N	Particular	Amount Excl GST) (in Rs.)	GST (in Rs.)	Total (in Rs.)
		A	B	A+B
1	Impact Assessment of HPVP CSR Project “ MARKET (Motivating AgRarian Communities for Kandhamal).” for the welfare of Tribal community in Odisha.	Rs. _____ In words: _____ _____ _____ _____	Rs. _____ In words: _____ _____ _____ _____	Rs. _____ In words: _____ _____ _____ _____

Authorised Signatory

Sign:

Date:

Name:

Designation:

Seal/Stamp:

Name and Address Agency:

Note:

- The price bid strictly should be in the prescribed format as above. Price are to be quoted in Indian currency i.e. INR.
- Letters/numbers should not be ambiguous. There should not be any discrepancy between price quoted in word and numerical value. In case of any discrepancy, prices in words would be taken for consideration for further course of actions.
- The price bid should be unconditional. If agency writes any condition/anticipation for execution of work in Price Bid, the bid will be disqualified and rejected accordingly.

Annexure- D**Details to be furnished by agency applying for Impact Assessment**

1. Name and address of the Agency:
2. Registration number and Date of Registration (copy of registration to be submitted)
3. Name of the Contact Person with designation:
4. Address for communication with telephone number, fax, email.
5. Geographical Area/span of operation (mention districts in which impact assessment have been done earlier). Please enclose supporting documents (i.e. Work Order/ Letter from organization for whom Impact Assessment study done).
6. Brief introduction about agency, scope of works/services offered.
7. Details of the Manpower proposed to be deployed for the assignment. Name and designation of leader/head leading the team of impact assessment (for co-ordination for impact impact assessment study) to be given. Biodata of the concerned person to be enclosed. Another sheet as Annexure E may be added.

S.N	Name of the Team leader	Designation in Organization	Role in job of impact assessment	Qualification/ Specialization	Experience in years	Major Tasks performed	CV/Profile (Y/N)

8. Details of experience of the Agency:
Another sheet as **Annexure F** may be added.

S.N	Name/particulars of assignment on impact assessment	Name of client	Start date	End Date	Major Tasks performed	Location of the project	Details attached at page no.

9. Financial criteria:

Financial statements consisting of Auditor's report, balance sheet, Profit & Loss Account Income and Expenditure Statement and Cash Flow Statement; ITR for the last 3 Financial Years (*copy to be attached*) and also specify the details as per table:

Financial Year (audited report)	Net Worth (Positive/Negative)	Annual Income in Rs. lakhs	Annual Turnover in Rs.lakhs
2020-21			
2021-22			
2022-23			

10. Executive Summary of all the Impact Assessments work completed by the agency in the domain of Corporate Social Responsibility/ Sustainability Services/ Community Development Projects; financed by any Central Ministry/ World Bank/ NABARD and/or other international donor institution (e.g., ADB, EU etc) or Central / State PSE.

Annexure E**Details of the Manpower proposed to be deployed for the assignment:**

Name of Team leader: _____

PG degree certificate enclosed: _____ (yes/no)

S.N.	Name of the Key Person/expert	Designation in Organization	Role in job of impact assessment	Qualification/ Specialization	Experience in years	Major Tasks performed	CV/Profile (Y/N)
1			Team Leader				
2			Team Member 1				
3			Team Member 2				

Sign, name and stamp of competent authority of agency

Details of experience of the Agency:

S.N.	Name/particulars of assignment on impact assessment (please enclose the copy of the report)	Name of client	Start date	End Date	Major Tasks performed	Location of the project	Details attached at page no.
1							
2							
3							

Sign, name and stamp of competent authority of agency

DECLARATION CERTIFICATE (on letter head of agency)

It is declared and certified that:

1. The information given above / in the proposal ref **NIT NO: OS/WC/2024-25/142/97** **date:11.01.2025** for Impact Assessment study of “ **MARKET** (Motivating AgRarian Communities for Kandhamal).” for the welfare of Tribal community in Odisha, CSR Project, submitted to BHEL, are TRUE to the best of my knowledge. The organization shall stand liable for any information given herewith which is later found to be false/ incorrect.
2. Our agency/organization/institution is interested to undertake the proposed evaluation /study.
3. I have gone through the terms and conditions and agree to abide by the same.
4. I am competent and authorized to sign this Declaration.
5. I have read and understood the terms and conditions mentioned in the said NIT. Notwithstanding anything mentioned in our bid, I hereby accept all the terms and conditions of the said tender. I confirm that the offer submitted by us confirming to all the terms and conditions mentioned in the tender document. I hereby undertake and confirm that I have understood the scope of services properly and, if selected, I shall carry out the job as mentioned in this tender accordingly.
6. There is no deviation w.r.t terms/ conditions/ scope mentioned in the NIT.
7. I do hereby declare that there is no case with the Police/Court/Regulatory authorities against our proprietor/firm/partner/organization. Also our organization has not been suspended / delisted / blacklisted by any other Govt. Ministry/Department/Public Sector Undertaking/ Autonomous Body/Financial institution/Court. We also certify that neither our firm nor any of the partners are involved in any scam or disciplinary proceedings settled or pending adjudication. None of our officials are related to board member or employees of BHEL.
8. In case of selection of our organization for job of impact assessment, Shri/Smt. _____ Designation _____ would be the team leader for the job. His/her academic qualification is _____ and has more than ____ years of experience. He/She fulfils the criteria mentioned in clause d.3 of this NIT. In case, at the time of job of assessment, if he/she is unavailable (due to leave/resignation/out-station assignment or other reason), another official who fulfils the criteria mentioned in d.3 of this NIT would be deployed for the job.

This certificate is issued for selection of proposal for impact assessment of BHEL CSR Project “ **MARKET** (Motivating AgRarian Communities for Kandhamal).” for the welfare of Tribal community in Odisha”. All the information documents submitted by us are true to the best of my knowledge.

Date:

Authorised Signatory

Place:

Sign:

Date:

Name:

Designation:

Seal/Stamp:

Name and Address Agency:

Annexure-H**Check list**

Sr.No.	Required Document	Envelope	Tick (√), If enclosed
1	Copy of NIT tender documents (all pages 1 to 12) (duly signed and stamped)	Techno-commercial Bid Envelope 1	
2	Audited Balance sheet & ITR for 3 financial years (duly signed and stamped)		
3	Work orders / letter from clients in support of qualification for techno-commercial bids (duly signed and stamped)		
4	PG certificate of Team Leader and CV/Profile of key person. (duly signed and stamped)		
5	Copy of PAN card of agency (duly signed and stamped)		
6	Copy of GST registration (duly signed and stamped)		
7	Copy of Agency's incorporation/ registration certificate (duly signed and stamped)		
8	Annexure D (Details of Agency) (duly signed and stamped)		
9	Annexure E (Details of Manpower) (duly signed and stamped)		
10	Annexure F (Detail of Experience of Agency) (duly signed and stamped)		
11	Annexure G Declaration Certificate (duly signed and stamped)		
12	Annexure C (unquoted price bid). This is to assure that agency has understood the format of price bid		
13	Information brochure/awards/any other letter/documents (optional; not mandatory) which agency wishes to submit in support of its credibility.		
14	Quoted Price Bid as per Annexure C (duly signed and stamped)		
15	Tender Bid		