

## **REQUEST FOR PROPOSAL (RFP)**

### **Hiring of Consultant for Conversion of Non-Funded Gratuity Fund into Funded Gratuity Fund, Registration & FBR Recognition**

**Procuring Agency:** PAEC Foundation

**Method of Procurement:** Single Stage – Two Envelope Procedure (Technical & Financial)

**Selection Method:** Least Cost Selection (LCS) – Financial bids of technically qualified firms only

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#### **1. Introduction**

PAEC Foundation intends to engage a qualified and experienced consulting firm/CA firm/legal advisor for conversion of its Non-Funded Gratuity Fund into a Funded Gratuity Fund, registration with relevant authorities, and obtaining recognition from the Federal Board of Revenue in accordance with applicable laws and regulations.

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#### **2. Scope of Services**

The consultant shall:

1. Advise on structuring of the Funded Gratuity Scheme
  2. Draft and finalize:
    - Trust Deed
    - Gratuity Fund Rules
    - Board Resolutions
    - All statutory documentation
  3. Assist in registration of the Gratuity Fund with relevant authorities
  4. Obtain recognition of the Gratuity Fund from FBR
  5. Liaise with FBR and concerned departments till completion
  6. Provide compliance checklist and post-recognition advisory note
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#### **3. Procurement Method (Strictly as per PPRA Rule 36(b))**

This procurement shall be conducted under **Rule 36(b) – Single Stage Two Envelope Procedure** of the Public Procurement Rules, 2004.

Under this procedure:

1. The bid shall comprise a **single package containing two separate envelopes:**

- Envelope No. 1: Technical Proposal
  - Envelope No. 2: Financial Proposal
2. Both envelopes shall be clearly marked as:
    - “TECHNICAL PROPOSAL”
    - “FINANCIAL PROPOSAL”
  3. The envelopes shall be placed in one outer envelope and sealed.
  4. At the time of bid opening:
    - Only the **Technical Proposals** shall be opened.
    - The Financial Proposals shall remain sealed and kept in safe custody.
  5. The Technical Proposals shall be evaluated in accordance with the evaluation criteria disclosed in the RFP.
  6. The Financial Proposals of bids found technically non-responsive or scoring less than the minimum qualifying marks shall be returned unopened.
  7. The Financial Proposals of technically qualified bidders shall be opened publicly at a time, date and venue to be communicated in writing.
  8. The contract shall be awarded to the bidder quoting the **lowest evaluated cost** among technically qualified bidders.
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## **4. Proposal Submission Requirements**

### **A. Technical Proposal (Envelope-1)**

The Technical Proposal shall include:

1. Company Profile & Legal Status
2. Valid Registration Certificates (NTN, Firm Registration, etc.)
3. Relevant Experience
4. Proposed Methodology & Work Plan
5. Proposed Team Composition with CVs
6. Proposed Timeline (maximum completion period to be specified by bidder)
7. Affidavit of non-blacklisting
8. Any additional supporting documents

**Important:** Financial information must not be included in the technical proposal.

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## B. Financial Proposal (Envelope-2)

The Financial Proposal shall include:

- Lump Sum Professional Fee (inclusive of all taxes, duties, out-of-pocket expenses)  
OR
- Stage-wise Payment Schedule (if proposed)

All taxes must be clearly mentioned.

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## 4. Mandatory Eligibility

The following are **mandatory requirements**. Failure to comply will result in disqualification:

1. Valid NTN and Active Taxpayer status
2. Registered firm (SECP / Partnership / Sole Proprietor, as applicable)
3. Minimum **5 years' operational experience**
4. Not blacklisted by any Government/Semi-Government Organization
5. At least **one completed assignment** related to:
  - Gratuity Fund / Provident Fund  
OR
  - Trust registration and FBR recognition

Only firms meeting the above will proceed to scoring stage.

## 5. Evaluation & Selection Method

### Step-1: Technical Evaluation

Technical proposals will be evaluated out of **100 Marks**.

Minimum qualifying score = **70 Marks**.

Only technically qualified firms ( $\geq 70$  marks) will proceed to financial evaluation.

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### Technical Evaluation Criteria (100 Marks)

Sr.	Criteria	Marks
1	Firm Profile & Legal Status	15
2	Relevant Experience (Public/Private Sector)	30
3	Experience in Fund Registration & FBR Recognition	15

Sr.	Criteria	Marks
4	Proposed Methodology & Work Plan	20
5	Key Professional Staff Qualification & Experience	15
6	Proposed Timeline	5
<b>Total</b>		<b>100</b>

Minimum qualifying marks = 70

### Technical Evaluation (100 Marks)

#### A. Firm Profile & Institutional Capacity – 15 Marks

Sub-Criteria	Marks
Legal status & registration compliance	5
Years of relevant experience (5–7 yrs = 3, 8–10 yrs = 4, 10+ yrs = 5)	5
Organizational strength (qualified staff, office presence, resources)	5
<b>Total</b>	<b>15</b>

#### B. Relevant Experience – 30 Marks

##### (i) Experience in Similar Assignments – 20 Marks

No. of Completed Assignments	Marks
1–2	8
3–4	14
5 or more	20

(Assignment must include Gratuity/Provident Fund structuring or FBR recognition.)

##### (ii) Public Sector Experience – 10 Marks

Experience	Marks
1 Public Sector Client	5
2 or more	10

#### C. Specific Experience in FBR Recognition of Funds – 15 Marks

<b>Criteria</b>	<b>Marks</b>
Proven experience in obtaining FBR recognition	10
Demonstrated liaison handling with tax authorities	5
<b>Total</b>	<b>15</b>

(Completion certificates or documentary evidence required.)

#### **D. Proposed Methodology & Work Plan – 20 Marks**

<b>Sub-Criteria</b>	<b>Marks</b>
Understanding of assignment & regulatory framework	5
Detailed step-by-step execution plan	7
Risk identification & mitigation strategy	4
Deliverables clarity	4
<b>Total</b>	<b>20</b>

#### **E. Key Professional Staff – 15 Marks**

<b>Position</b>	<b>Qualification &amp; Experience Marks</b>
Team Lead (CA/Advocate/Tax Expert – 7+ years)	8
Supporting Professional(s) (CA/ACCA/Law/Tax)	5
Support Staff	2
<b>Total</b>	<b>15</b>

(CVs required. Marks proportional to experience & relevance.)

#### **F. Timeline & Commitment – 5 Marks**

<b>Completion Period</b>	<b>Marks</b>
≤ 60 days	5
61–75 days	3

Completion Period	Marks
76–90 days	2

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### Step-2: Financial Evaluation (Least Cost Selection – LCS)

- Financial proposals of only technically qualified firms shall be opened.
- The firm quoting the **lowest evaluated cost** will be declared **Successful Bidder**, subject to approval of the competent authority.

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### 6. Payment Terms

- 30% upon submission of finalized Trust Deed & Rules
- 30% upon registration with relevant authority
- 40% upon obtaining FBR recognition

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### 7. Instructions to Bidders

- Proposals must remain valid for **90 days**.
- Incomplete proposals shall be rejected.
- PAEC Foundation reserves the right to accept or reject any or all proposals as per applicable procurement rules.
- The successful bidder shall enter into a formal agreement.

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### 8. Disqualification

Proposals may be rejected if:

- Financial proposal is included in technical envelope
- Bidder is blacklisted
- Required documents are missing

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### 9. Bid Security

Each bidder shall furnish a **Bid Security equal to Rs.20,000/-** in the form of:

- Bank Draft / Pay Order / CDR
- Issued by a scheduled bank in Pakistan
- In favor of PAEC Foundation

- Bid Security shall be attached with the **Technical Proposal**.

### 9.1 Forfeiture of Bid Security

Bid Security may be forfeited if:

- The bidder withdraws the bid during validity period
- The bidder fails to sign the contract
- The bidder fails to provide performance security (if required)

### 9.2 Refund of Bid Security

- To unsuccessful bidders: after award of contract
- To successful bidder: upon Completion of Work.

## BID DATA SHEET (BDS)

### Hiring of Consultant for Conversion of Non-Funded Gratuity Fund into Funded Gratuity Fund, Registration & FBR Recognition

Procuring Agency: PAEC Foundation

Procurement Method: Single Stage – Two Envelope Procedure (Rule 36(b) of the Public Procurement Rules 2004)

Regulatory Authority: Public Procurement Regulatory Authority

### 1. Basic Information

Sr. Description	Details
1 RFP Reference No.	PF/HR/Gratuity/2026-27
2 Date of Issuance of RFP	12-03-2026
3 Procurement Method	Single Stage – Two Envelope
4 Selection Method	Least Cost Selection (LCS)
5 Assignment Completion Period	60–90 Days
6 Bid Validity Period	90 Days from date of opening of Technical Proposal
7 Bid Security	Rs.20,000/-
8 Minimum Technical Qualifying Marks	70/100

## 2. Proposal Submission Details

<b>Sr.</b>	<b>Description</b>	<b>Details</b>
1	Last Date for Submission	20-04-2026
2	Time for Submission	1100 Hours
3	Venue of Submission	PAEC Foundation, adjacent to NORI Hospital, Hanna Road G-8/3 Islamabad
4	Mode of Submission	Hard Copy (Sealed)
5	Number of Copies	01 Original
6	Financial Proposal Copies	01 Original

Late submissions shall not be entertained.

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## 3. Bid Opening Details

### Technical Proposal Opening

#### Description Details

Date Same day as submission

Time 1130 Hours

Venue PAEC Foundation, adjacent to NORI Hospital, Hanna Road G-8/3 Islamabad

Attendance Bidders or authorized representatives

Only Technical Proposals shall be opened at this stage.

Financial Proposals shall remain sealed and kept in safe custody.

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## 9. Contact Details

Procurement Section

PAEC Foundation

PAEC Foundation, adjacent to NORI Hospital, Hanna Road G-8/3 Islamabad

Phone: 051-9263295-97

Fax: 051-2709970