

**M/s. BEML LIMITED,
BEML SOUDHA,
23/1,4th Main
SAMPANGIRAMA NAGAR,
BENGALURU - 560027**

**Notice for Inviting
Expression of Interest (Eoi)
For**

**Selection of Service Provider for providing Services of Point of Presence (POP)
for implementation of National Pension System (NPS) in BEML Limited.**

Reference No: CM/POP/Dec 2024 dtd 12.12.2024

Due closing date: 26.12.2024 14.00 Hrs

Issued by

BEML LIMITED

(Schedule 'A' Company under Ministry of Defence, Govt. Of India)

SECTION-1**Disclaimer**

The information contained in this Expression of Interest (Eoi) document provided to the Prospective Service Provider, by or on behalf of M/s BEML Ltd., or any of its executives or advisors, is provided to the Prospective Service Provider on the terms and conditions set out in this Eoi document and all other terms and conditions subject to which such information is provided.

1. The purpose of this Eoi document is to provide the Prospective Service Provider with information to assist the formulation of their proposal. This Eoi document does not purport to contain all the information each Prospective Service Provider may require. This Eoi document may not be appropriate for all persons, and it is not possible for BEML Ltd., its executives or advisors to consider the business/investment objectives, financial situation and particular needs of each Prospective Service Provider who reads or uses this Eoi document. Each Prospective Service Provider should conduct his own investigations and analysis and should check the accuracy, reliability and completeness of the information in this Eoi document and where necessary obtain independent advice from appropriate sources.
2. BEML Ltd., its executives and advisors make no representation or warranty and shall incur no liability under any law, statute, rules or regulations as to the accuracy, reliability or completeness of the Eoi document.
3. BEML Ltd., may, in its absolute discretion, but without being under any obligation to do so, modify, amend or supplement the information in this Eoi document.
4. The issue of this Eoi does not imply that BEML Ltd., is bound to select and shortlist any or all the Prospective Service Provider(s). Even after selection of suitable Prospective Service Provider, BEML Ltd., is not bound to proceed ahead with the Prospective Service Provider and in no case be responsible or liable for any commercial and consequential liabilities in any manner whatsoever.

5. The Prospective Service Provider shall bear all costs associated with the preparation, technical discussion/presentation and submission of response against this EoI. BEML Ltd., shall in no case be responsible or liable for these costs regardless of the conduct or outcome of the EoI process.
6. Canvassing in any form by the Prospective Service Provider(s) or by any other agency on their behalf shall lead to disqualification of their EoI.
7. Notwithstanding anything contained in this EoI, BEML Ltd., reserves the right to accept or reject any application and to annul the EoI process and reject all applications, at any time without any liability or any obligation for such acceptance, rejection or annulment and without assigning any reasons, thereof. In the event that BEML Ltd., rejects or annuls all the applications, it may at its discretion, invite all eligible Prospective Service Providers to submit fresh applications.
8. BEML Ltd., reserves the right to disqualify any applicant during or after completion of EoI process, if it is found there was a material misrepresentation by any such applicant or the applicant fails to provide within the specified time, supplemental information sought by BEML Ltd.,
9. BEML Ltd., reserves the right to verify all statements, information and documents submitted by the applicant in response to the EoI. Any such verification or lack of such verification by BEML Ltd., shall not relieve the applicant of his obligations or liabilities hereunder nor will it affect any rights of BEML Ltd.,

SECTION-2

Schedule of EoI process & contact details

A. Schedule of EoI process

The schedule of activities during the EoI Process shall be as follows -

| Sl.No. | Description | Date |
|---------------|---|-------------------------|
| 01 | Issue of EoI Document | 12.12.2024 |
| 02 | Last date of Submission of EoI response | 26.12.2024 at 14.00 hrs |

B. Contact Details related to Eoi**Assistant general Manager**23/1, 4th Main SR Nagar

BEML Soudha , BEML Ltd.,

Bangalore-560027

Karnataka

India.

Tel: 080-22965 179

Email: lakshmana.murthy@bemltd.in

1. Details of Expression of Interest (Eoi)

- 1.1 BEML Limited, scheduled 'A' Company under Ministry of Defence PSU with Corporate Headquarters located at BEML Soudha, No.23/1, 4th Main, S.R. Nagar, Bengaluru – 560 001, with Manufacturing Units at Bengaluru, Kolar Goldfields, Mysore and Palakkad, and has Nationwide network of After Sales & Service with 12 Regional Offices, 14 District Offices, 08 Activity Centres and 05 Service Centres at various locations all over India.
- 1.2 Presently BEML has separate Schemes for Defined Contribution Pension in respect of Executives. The Management of the Pension Scheme rests with a Trust constituted for the purpose BEML has engaged M/s LIC as the Fund Manager to manage the Pension Fund. The annuities are purchased from M/s LIC, M/s SBI Life and M/s HDFC Life i.e. the empanelled Annuity Service Providers, as per the various options exercised by various executives / nominees of deceased executive. The annuities are directly distributed by Annuity Service Providers to the superannuated executives / nominees of the deceased executives.
- 1.3 National Pension System (NPS) is a Government of India (GoI) promoted, Defined Contribution Pension Scheme, regulated by Pension Fund Regulatory Development Authority (PFRDA) under the Pension Fund Regulatory Development Authority Act, 2013.
- 1.4 BEML is in the process of implementing NPS for its executives. Accordingly, it is proposed to introduce "National Pension System (NPS) – Corporate Sector Model". The approximate Manpower strength of the Company is 2000 executives as on 30.11.2024 at various locations in India. However, the number of executives are subject to change due to new joining / separation of executives.
- 1.5 The Selection of Agency for providing Services of Point of Presence (PoP) for implementation of NPS in BEML would be minimum of one year and maximum period will be indicated in tender which will be floated on shortlisted bidders from this Eoi

2. SCOPE OF WORK AFTER AWARDING THE CONTRACT

The tentative scope of work which will cover are the following (Detail scope will be provided in tender)

a. Registration Processing :

- (i) Completion of the registration process with PFRDA and Central Record Keeping Agency (CRA) for BEML and allotment of Corporate Registration number for BEML under NPS. The bidder shall also facilitate changes in Trust Deed, Deed of Variation (DoV) and approval of Commissioner of Income Tax, etc. as & when required.
- (ii) The bidder shall process applications received from BEML executives for generation of PARN number.
- (iii) The bidder shall process request of BEML executives for merger of Individual NPS plan to Corporate NPS Plan. This should not attract any charges/levies. In case some accounts are dormant / inactive, the same needs to be activated.

b. Initial Contribution processing at the time of registration :

- (i) Collecting and transferring the funds after verifying the executive's details such as PARN number, Name, Payment details etc., to the Trustee Bank for the corresponding PRAN of the executive.
- (ii) Visit to the BEML Complexes / Offices for early processing of PRAN for executives if required , list of the executives, if required. List of BEML Complexes / Offices
- (iii) The bidder is expected to complete the process of registration of all BEML executives who are on rolls and have opted NPS, within 3 months from the date of award of contract. BEML will start contributing to PoP as soon as all the necessary requirements related to BEML are completed. In respect of new inductions, PoP is expected to complete the process of registration within one month from the date of receipt of requisite details from BEML.

c. Regular Pension Contribution :

- (I) After all due diligence, collecting and transferring the Funds to the NPS Trustee Bank for the corresponding PRAN of the subscriber.
- (II) Upload subscriber contribution details online into the CRA system for the corresponding PRAN of the subscriber.

d. Transfer to Superannuation Fund to NPS :

Providing assistance and processing transfer of existing corpus of BEML Defined Contribution Scheme maintained with LIC to NPS, in future. The bidder shall facilitate movement of funds from M/s LIC to NPS in respect of beneficiaries who opt for NPS.

e. Changes in Subscriber details :

The bidder shall also provide the following non-financial services related to NPS to executives:

- (i) Processing change request for change in executive's personal details such as address etc.
- (ii) Processing change request of Investment Scheme / Pension Fund Manager.
- (iii) Processing of withdrawal request.
- (iv) Attend request from executive for re-issue/regeneration of I-pin, T-pin, PRAN card.
- (v) Any other subscriber services prescribed by PFRDA/CRA from time to time.

f. Grievance handling :

- (i) The bidder shall communicate with other NPS intermediaries for resolving the grievances of the executives of BEML and ensure prompt resolution of grievances.
- (ii) The queries related to the NPS Corporate Model shall be resolved by the bidder on call & email etc. The Query related numbers /e-mail etc., of the bidder and details of Escalation Matrix of the selected PoP should be provided in the Service Level Agreement to be executed between BEML and selected bidder.
- (iii) The bidder shall address the queries/grievances of the executives within the deadline prescribed by PFRDA.

g. The bidder shall complete the work assigned within the deadlines prescribed by PFRDA.

h. BEML will provide the following to the successful bidder :

- (i) Bulk data as per the format provided by PoP for mapping of individual accounts of executives to Corporate NPS account of BEML.
- (ii) One time contribution data in the prescribed format provided by PoP along with the funds for transfer to Trustee Bank and maintenance of records by CRA.
- (iii) Monthly contribution data along with funds thereafter every month for transfer to Trustee Bank.

- i. Facilitation of settlement of Funds i.e. receipt of amount by concerned individual members on account of superannuation etc., as per NPS guidelines prescribed by PFRDA.
- j. In cases of such executives where disciplinary proceedings are being contemplated/ initiated/ in progress or any penalty has been imposed, as the case may be, the PoP will administer the admissibility / release of the benefits to such executive, as directed by BEML, in accordance with various PFRDA guidelines.
- k. The role of the PoP would be advisory in nature in respect of selection of Personal Financial Management (PFM) . BEML / subscribers reserves its right to place the funds with the PFM of its choice.
- l. The bidder shall conduct awareness programs / webinars / workshops / training sessions on the various features of NPS to BEML executives, in virtual mode as well as physical mode at BEML locations, if required. Initial training need to e provided every week till the time PRAN Account of all BEML executives who have opted for NPS is opened.
- m. Preparation of bilingual (in Hindi and English) brochure explaining various feature of the NPS Scheme to BEML executives and periodic updating of the brochure. Brochure is to be prepared in PDF format and soft copy provided to BEML for circulation. Brochure will be BEML property and BEML will be free to use it in any manner.

3. **ELIGIBILITY CRITERIA :**

- 3.1 The bids received from the Bidders meeting the criteria specified as under will be considered for evaluation :

| Sl. No. | Eligibility Criteria | Documents to be Submitted |
|---------|---|--|
| a. | Bidder should have PFRDA License with minimum 3 years of experience as on 30-11-2024 to operate as Point of Preference (PoP) and to have tie up with any of the Central Record Keeping Agencies (CRAs) registered under NPS for the CRA Services. | CRA for tie up. Self-attested copy of valid Registration Certificate issued by PFRDA (copy of License with validity date) and letter of confirmation from the registered |
| c. | Bidder should have valid GST Registration Certificate and PAN. | Self-attested copy of these documents. |
| d. | Bidder should be a Scheduled Bank / Insurance Company / PFRDA empanelled Annuity Provider / Asset Management Company or subsidiary of any of the aforesaid type of company. | Self-attested copy of Certificate of Incorporation of company. |

| | | |
|----|--|---|
| e. | Bidder should have online platform or web based application for servicing NPS subscribers for NP registration. | A copy of presentation and screenshot of the online portal or web based application. |
| f. | Bidder should have experience of providing PoP service in at least 300 Corporates with a total of minimum 25,000 subscribers in NPS under Corporate Model. | Certificate from CRA mentioning the Corporate Subscribers handled as on 30.11.2024 |
| g. | Bidder should have experience of providing PoP service in at least 3 presently serving different CPSEs subscribers in NPS under Corporate Model. | Self-attested & stamped copies of Work Orders/ Letter of Award et., reflecting fulfilment of this criteria. |
| h. | Bidder should neither have been suspended / banned / blacklisted / debarred by any Central / State Government Department / Agency or any other PSU / PSB not should have litigation pending with any of the aforesaid organization / departments / agencies in the last 3 consecutive financial years (FY 2021-22, 2022-23 and 2023-24) and as on tender opening date. | Self-Declaration Certificate |
| i. | No legal case / complaint should be pending against the bidder by the Government Department / Agencies / CPSE / Statutory Authorities like PFRDA etc. | Self-Declaration Certificate |

Those firms qualified in EOI, Limited tender will be floated for finalizing the service provider through QCBS method.

4. Instructions for Submission of Bid

4.1 The interested Prospective Service Provider(s) should submit their response

with enclosed annexures on or before Date 26.12.2024 14.00 Hrs in sealed Cover. The filled, attested Documents mentioned in EOI to be submitted in **Sealed envelope duly superscribing as “EOI for Selection of Agency for providing Services of Point of Presence (POP)”** shall also to be written in bold letters at the top of the envelope. The name and address of the bidder shall be printed or written legibly on the left-hand bottom corner of the envelope.

Documents has to reach the address as mentioned below on or before the closing date & time of the Eoi

The Executive Director,
Corporate Materials.
BEML LTD, BEML SOUDHA,
23/1, 4th Main, S.R. Nagar,
Bangalore – 560 027

5. other instructions

5.1 The response shall necessarily be accompanied with following details:

1. Company background
2. Services offering
3. Experience details
4. Reference list of customers
5. As mentioned in eligibility criteria

5.2 Language: All correspondences and documents related to the Eol response shall be in English language, provided that any printed literature furnished by the Prospective Service Provider(s) may be written in another language, as long as such literature is accompanied by a translation of its pertinent passages in English language in which case, for purposes of interpretation of the bid, the English translation shall govern.

5.3 The Prospective Service Provider(s) shall abide by the terms & conditions, as applicable, of the Eol.

5.4 All pages of the response against this Eol shall be duly signed by the authorised signatory.

5.5 Multiple proposals from the same Perspective Service Provider should not be submitted.

5.6 BEML Ltd., at its discretion shall inspect the Prospective Service Provider's works/ office/ reference site premises for the purpose of evaluation, as deemed necessary before selection of Service Provider. BEML Ltd., decision in this regard shall be final.

5.7 BEML Ltd., shall receive applications pursuant to this Eol in accordance with the terms set forth herein, as modified, altered, amended and clarified from time to time by BEML Ltd., and all applications shall be submitted in accordance with such terms on or before the date specified in this Eol for submission of applications.

In case any amendment/corrigendum to this Eol is issued, it shall be notified only at www.bemlindia.in

5.8 PROCESS TO BE CONFIDENTIAL:

Information relating to the examination, clarification, evaluation and comparison of EoI and recommendations shall not be disclosed to Prospective Service Provider(s). Any effort by Prospective Service Provider(s) to influence BEML Ltd., in processing of EoI or selection decisions may result in the rejection of the response against EoI.

5.9 GOVERNING LAWS & JURISDICTION:

The EoI process shall be governed by, and construed in accordance with the laws of India and the Courts at Bangalore (India) shall have exclusive jurisdiction over all disputes arising under, pursuant to and / or in connection with the EoI process.

Annexure-I**Details of PoP**

| Sl.No. | Description | Bidder Response | | |
|--------|--|-----------------|----------|-----|
| 1 | Name of the PoP | | | |
| 2 | Ownership Details (Private / PSU – Central or State) | | | |
| 3 | Registered Corporation Office Address | | | |
| 4 | Communication Address | | | |
| 5 | Phone No. | | | |
| 6 | Fax No. | | | |
| 7 | Name of the Authorised Representative & Designation | | | |
| 8 | Mobile No. of authorised Representative | | | |
| 9 | E-Mail ID | | | |
| 10 | Company's Registration No. | | | |
| 11 | Date of Establishment of Firm | | | |
| 12 | GST Registration | | | |
| 13 | Permanent A/c No. | | | |
| 14 | PoP Registration No. & Date | | | |
| 15 | No. of years experience as PoP | | | |
| 16 | Annual Financial Turnover & PBT for the last 3 Financial Years (Copy of audited Balance sheet and Profit & Loss Account of last 3 years | FY | Turnover | PBT |
| | | 2021-22 | | |
| | | 2022-23 | | |
| | | 2023-24 | | |

I have enclosed the copies of audited Balance Sheet and Profit & Loss Account of last 3 Financial Years (2021-2022, 2022-23 & 2023-24) and cancelled cheque.

Dated:

For and on Behalf of
Signature with date
Name
Designation
Company Seal

Annexure – II**Certificate of Authorized Representative**

To,
General Manager (Corporate Materials)
BEML Limited
Corporate Office, BEML Soudha,
23/1, Mission Road,
Bengaluru – 560 027

Dear Sir,

Sub : Selection of Agency for providing Services of Point of Presence (PoP)
for Implementation of National Pension System (NPS) in BEML
Limited.

I. (Name of authorized representative) on behalf of M/s (Name of PoP) do hereby submit bids in response to your RFQ No..... dated on the above subject. I certify that I am the duly authorized representative of the subject Tenderer and a valid power of attorney / Board Resolution followed by linking successive Power of Attorney(ies), to this effect is also enclosed.

2. It is certified that all the information and data furnished are true and complete to the best of my knowledge and I have read and understood all the Terms & Conditions in the Tender document.

Dated :

For and on behalf of:

Signature with date :

Name:

Designation:

Company Seal:

Annexure III

| Name of the Vendor / Firm | | | |
|---------------------------|---|---------------------------|----------------------------|
| Sl. No. | Description | Documents to be submitted | Bidder response (Yes / No) |
| (i) | Number of CPSE accounts being handled as on 30.11.2024. | Certificate from CRA | |
| (ii) | Number of CPSE subscribers being managed as on 30.11.2024. | Certificate from CRA | |
| (iii) | Number of total corporate accounts being handled (including CPSEs & Private Companies) as on 30.11.2024. | Certificate from CRA | |
| (iv) | Number of Corporate subscribers (including CPSEs & Private Companies) being managed as on 30.11.2024 (excluding executives of Own & Group Companies). | Certificate from CRA | |
| (v) | Number of years' experience in NPS as PoP. | Certificate from CRA | |