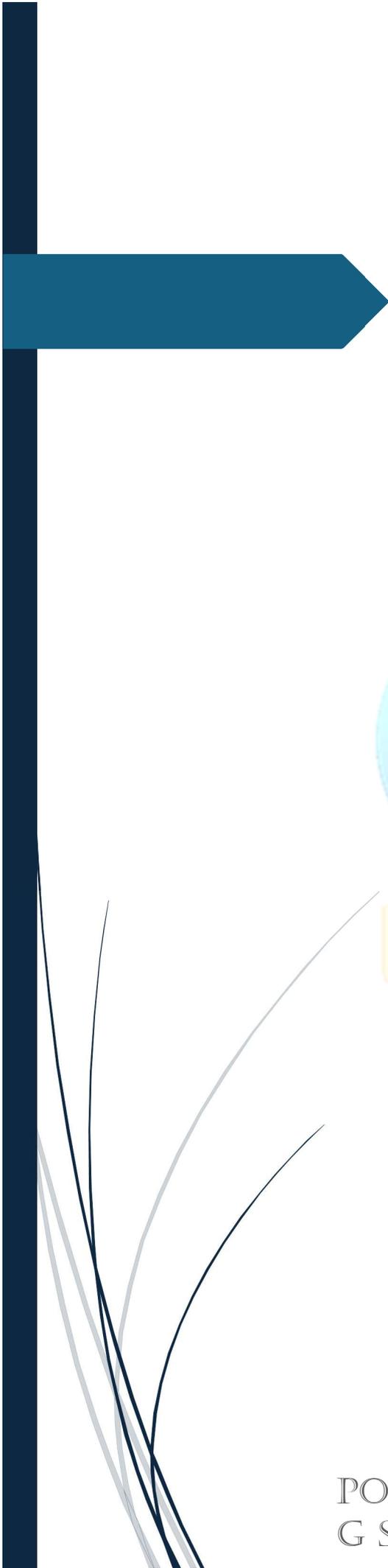




IREPS BIDDING  
AND  
MANAGEMENT  
COURSE



Adv Gaurav Kumar L.LB, B.COM  
(High Court of Jharkhand)



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# BIDDING PROCESS: TECHNICAL & FINANCIAL SUBMISSION

Submitting a tender is not a clerical action—it is a compliance-driven, risk-sensitive, and strategically layered process. A single deviation, wrong attachment, incorrect specification entry, or BOQ error can lead to *instant disqualification*, even if the bidder offers the best price.

This chapter provides a comprehensive walkthrough of the bidding workflow, ensuring that organizations follow a standardized, error-free process aligned with industry best practices and Leegal's tender submission methodology.

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## The Two-Envelope Bidding System

Government tenders across India follow a **two-envelope system**, which separates evaluation into:

### 1. Technical Bid – Qualification Stage

The buyer evaluates:

- Eligibility
- Experience
- Capability
- Compliance
- Documentation
- Technical suitability

### 2. Financial Bid – Price Stage

Only technically qualified bidders reach this stage.

This structure ensures transparency and avoids price-based bias during initial evaluation.

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### Pre-Bid Checklist (Leegal Standard)

Before beginning submission, conduct a **pre-bid audit**:

- ✓ Verify eligibility
- ✓ Ensure all documents are updated & signed
- ✓ Validate DSC functionality
- ✓ Review corrigenda
- ✓ Understand BOQ format
- ✓ Check NIT timelines
- ✓ Prepare technical write-ups
- ✓ Cross-check all formats
- ✓ Confirm team responsibilities

A robust pre-bid checklist eliminates 80% of submission errors.

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### The Technical Bid – Purpose & Importance

The **Technical Bid** establishes that the bidder *can* perform the work. It contains:

- Mandatory documents
- Eligibility proofs
- Technical parameters
- Compliance declarations
- Experience credentials

A strong technical submission boosts credibility even before pricing.

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## **Documents Required in the Technical Bid**

Common documents include:

### **1. Company Profile & Legal Documents**

- Incorporation certificate
- Partnership deed / MOA-AOA
- MSME certificate
- PAN & GST
- Address proof

### **2. Eligibility Documents**

- Work experience certificates
- Completion certificates
- Purchase orders
- Performance records
- Turnover & audited balance sheets

### **3. Technical Compliance**

- Product specifications
- Brochures
- OEM authorizations
- Methodology documents
- Site execution plans

#### 4. Statutory Documents

- EPF registration
- ESIC
- Labour license
- ISO / BIS certificates

#### 5. Tender-Specific Formats

- Annexures
- Affidavits
- Declarations
- Power of attorney
- Undertakings

Missing any required document = **automatic technical disqualification.**

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#### Technical Bid Writing – Leegal’s Method

Professional technical bid writing includes:

##### ✓ **Cover Letter (Formal Submission)**

Crisp, structured, and aligned to tender language.

##### ✓ **Detailed Methodology**

How work will be executed.

##### ✓ **Work Plan / Execution Strategy**

Clear timelines, manpower plan, and safety approach.

##### ✓ **Technical Data Sheet**

Specification compliance table.

##### ✓ **Deviations Statement (if allowed)**

Declare deviations transparently to avoid future disputes.

##### ✓ **Capability Statement**

Highlight organizational strengths.

## ✓ Past Performance Summary

Summarize similar work experience.

A strong technical bid increases credibility and reduces audit queries.

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## Technical Bid Evaluation Process

Government departments evaluate:

### A. Eligibility Match

Experience, financial criteria, similar work.

### B. Technical Parameter Matching

Items must match specifications exactly.

### C. Compliance Documentation

Formats complete? Signed? Stamped?

### D. Risk Evaluation

Department checks if you can execute safely.

### E. Clarification Stage

Departments may seek clarifications; responses must be timely & accurate.

Only after technical approval → **Financial Bid opens.**

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## The Financial Bid – Purpose & Structure

The **Financial Bid** (or BOQ) represents your pricing.

Government evaluation is based on:

- L1 (Lowest Price)
- L2, L3...
- Reverse auction (if applicable)

The BOQ format is usually **Excel**, downloadable from the portal.

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## Understanding the BOQ (Price Schedule)

Common BOQ fields include:

<b>Field</b>	<b>Description</b>
Item Name	What is being priced
Quantity	Total required
Unit	No., Kg, Meter, Litre
Unit Rate	Your quoted price
Taxes	Whether included or excluded
Total Price	Auto-calculated

**Critical Rule:**

*Do not alter the BOQ format.*

Altering the file = disqualification.

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**Pricing Strategies for Financial Bid**

Leegal advises multiple pricing frameworks:

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**1. Bottom-Up Costing**

Calculate raw cost, then add overheads.

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**2. Market Benchmarking**

Study competitor pricing and industry rates.

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**3. Risk Adjustment Pricing**

Include risks like:

- Site challenges
- Unpredictable material costs
- Skilled manpower shortage

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**4. Compliance-Correct Pricing**

Include statutory benefits:

- PF
  - ESI
  - Minimum wages
  - Safety compliance
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## 5. Value-Based Pricing (For Consultancy)

Price based on expertise and outcome, not hours.

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### Common Mistakes in Financial Bid Submission

- ✗ Entering wrong unit of measurement
- ✗ Including GST when BOQ requires base price
- ✗ Typing figures instead of formulas
- ✗ Changing BOQ format
- ✗ Submitting blank sheets
- ✗ Forgetting sign & stamp on uploaded PDF summary (if required)
- ✗ Not including all line items

These mistakes directly lead to **financial bid rejection**.

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### Financial Evaluation Process (Government Logic)

Departments evaluate:

- ✓ Mathematical correctness
- ✓ BOQ completeness
- ✓ Tax treatment accuracy
- ✓ L1 ranking
- ✓ RA eligibility

If RA (Reverse Auction) is triggered:

- L1 becomes starting point

- Other bidders re-quote lower prices
  - Auto-extension rules apply
  - Final L1 wins the contract
- 

## **Digital Submission Workflow Across Portals**

### **1. GeM**

- Technical → Financial
- Auto-validation
- No manual uploads allowed in BOQ

### **2. IREPS**

- Multiple document upload
- Digital signature required
- Separate technical & financial encryption

### **3. MSTC**

- e-auction uses real-time pricing
- Scrap & disposal model

### **4. CPPP**

- Standardized document uploads
- BOQ template mandatory

### **5. State Portals**

- Vary in complexity
  - Require strong DSC handling
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## **Submission Verification Checklist**

Before final submission:

- ✓ **DSC functioning verified**
- ✓ **All documents named properly**
- ✓ **File size & format checked**

✓ **BOQ validated**

✓ **All annexures attached**

✓ **No duplicate files**

✓ **No password-protected files**

✓ **Time buffer of 2–3 hours for final upload**

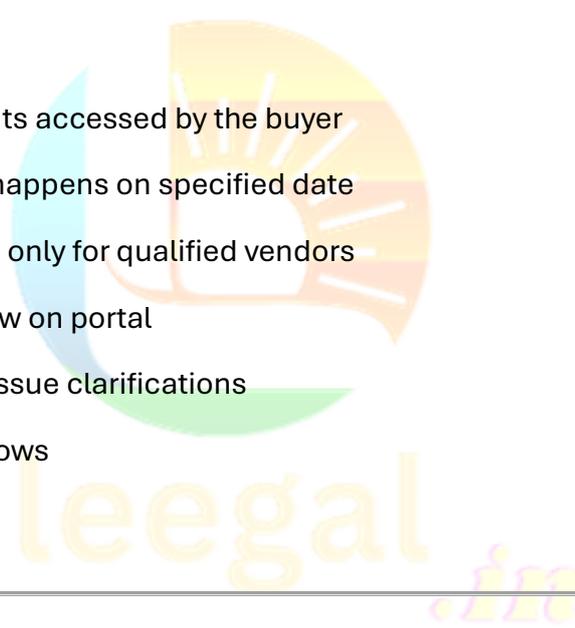
Leegal advises clients:

**Never upload during the last 1 hour before submission.**

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### **After Submission – What Happens?**

Once submitted:

- Bid locking occurs
  - Technical documents accessed by the buyer
  - Technical opening happens on specified date
  - Financial bid opens only for qualified vendors
  - Status updates show on portal
  - Departments may issue clarifications
  - Award decision follows
  - LOA issued to L1
- 
- The image contains a large, semi-transparent watermark of the Leegal logo. The logo features a stylized sun with rays in shades of yellow and orange, partially obscured by a blue and green circular shape. Below the graphic, the word "leegal" is written in a lowercase, sans-serif font. To the right of the word, there is a small icon of a person with arms raised, also in a semi-transparent style.

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### **Summary – Submission Is a Strategic Operation**

A successful bid submission ensures:

- Zero compliance errors
- Zero rejection risk
- Accurate technical match
- Competitive and realistic pricing
- Professional documentation
- High probability of qualification

This chapter equips you to manage technical & financial submissions with the precision of a professional procurement agency backed by Leegal's best practices.

