



Indian Institute of Management Lucknow
भारतीय प्रबंध संस्थान लखनऊ
Prabandh Nagar, IIM Road, Lucknow - 226013
प्रबंध नगर, आईआईएम रोड, लखनऊ

Date: 21-11-2021

CORRIGENDUM-2

This is with reference to **RFP No. IIML-NC/MR Agency-CMEE/2021-22/008** dated **28/09/2021** towards the '**Empanelment of Marketing Research Field Agencies for Facilitating Research Projects**', undertaken by the Centre for Marketing in Emerging Economies (CMEE) at IIM Lucknow-Noida campus

Extension of the last date of submission

Last date of Submission	27-November-2021 (Sat.) by 1800 hrs
Date of Opening of Technical Bid	29-November-2021 (Mon.) at 1500 hrs

Rest of the Terms & Conditions of the tender document remains unchanged

Administrative Officer
Purchase & Stores



भारतीय प्रबन्ध संस्थान लखनऊ
INDIAN INSTITUTE OF MANAGEMENT LUCKNOW
Prabandh Nagar, IIM Road, Lucknow - 226013

Date: 28/10/2021

CORRIGENDUM-1

This has reference to RFP NO. **IIML-NC/MR Agency-CMEE/2021-22/008** dated 28/09/2021 for the 'Empanelment of Marketing Research Field Agencies for Facilitating Research Projects', undertaken by the Centre for Marketing in Emerging Economies) CMEE (at IIM Lucknow-Noida Campus .

- Extension for last date of tender submission:

Last date of Submission of tender	20 th November, 2021 on or before 02:00 PM
Date of opening of Tender	The Tender documents shall be opened on the 22 nd November, 2021 at 03:00 PM.

Rest terms & conditions of the tender document shall be remains unchanged.

Administrative Officer
Purchase & Stores



भारतीय प्रबंध संस्थान लखनऊ, नोएडा परिसर
Indian Institute of Management Lucknow, Noida Campus

Request for Proposal (RFP)

for the

**Empanelment of Marketing Research Field Agencies
for Facilitating Research Projects**

undertaken by the

**Centre for Marketing in Emerging Economies (CMEE)
IIM Lucknow-Noida Campus**

Indian Institute of Management Lucknow – Noida campus

Plot No. B-1, Institutional Area, Sector-62, Noida – 201307, Uttar Pradesh

Contact No Tel: 0120-6678515, 8483/8486 | Fax: 0120-6678506

Ref. No. : IIML-NC/MR Agency-CMEE/2021-22/008

Issue Date: 28th September, 2021

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भारतीय प्रबंध संस्थान लखनऊ, नोएडा परिसर

Indian Institute of Management Lucknow, Noida Campus

Plot No . B-1, Institutional Area, Sector-62, Noida-201307, Uttar Pradesh, India

Contact No . Tel: 0120-6678483 | Mob. +91-8826280997 |

Website: www.iimlcmee.org | www.iiml.ac.in |

E-mail: cmee@iiml.ac.in | cmeechair@iiml.ac.in | purchase@iiml.ac.in
| purchase_iimlnc@iiml.ac.in

Ref. No . : IIML-NC/MR Agency-CMEE/2021-22/008

Date: 28th September, 2021

Request for Proposal (RFP)

Subject: Request for Proposal (RFP) for the 'Empanelment of Marketing Research Field Agencies for Facilitating Research Projects', undertaken by the Centre for Marketing in Emerging Economies (CMEE) at IIM Lucknow-Noida Campus .

Proposals/bids are invited from the interested reputed marketing research field agencies for facilitating the collection of either or both qualitative and quantitative data for several research projects to be undertaken by the Centre for Marketing in Emerging Economies (CMEE), IIM Lucknow Noida Campus. CMEE will collaborate with the diverse stakeholder clients, which shall be in the broad gamut of Digitalization/Marketing of Financial Services, Healthcare, Security, Education, Skill Development, Consumer Affairs, MSME, e-Governance, Oil & Gas, e-commerce, Telecom, Railways, Tourism & Hospitality, Skill & Livelihood services etc. The eligible and interested agencies/firms/bidders may submit their proposal for empanelment of their agencies :

Application Process

- Interested parties are requested to carefully read this document and understand the need and requirement and can apply as per the given proforma and format

Sr. No.	STEPS
01.	Submission of Technical Bid (Section-A) – Annexure – A Online Presentation on APPROACH & METHODOLOGY (Section-B) by the bidders qualifies in Section-A (Details of presentation may be seen in Annexure-C)
02	Bidders qualifying in Section-B of the Technical Evaluation (APPROACH & METHODOLOGY), will be issued a Letter of Empanelment with a request to complete some formalities including the execution of an 'agreement' on a non-judicial stamp paper of Rs. 100/- (the cost of this stamp paper & any other associated cost shall be borne by the bidder/ agency). On execution of this agreement and fulfilling the conditions mentioned in the Letter of Empanelment, the bidders/ agencies will be called 'Empanelled Agencies' of IIM Lucknow Noida Campus.
02.	Submission of Financial Bid: Upon grant of a related project to IIM Lucknow, the Institute will invite Financial bids for each project or part of the project from the empanelled bidders/Agencies, through Limited Tender Enquiries on the CPP portal or any other means, as deemed fit by the Institute. The empanelled agencies will be required to submit their financial bid at a short notice. The work will be awarded to the Lowest Bidder based on the rate quoted for each project. After the empanelment of the agencies, it will be at the discretion of IIM Lucknow that whether to invite bids from the empanelled bidders through a limited tender enquiry or from all the available agencies through an open tender or any other means. There are possibilities that part-wise bids will be invited and the Lowest bidder may be decided part-wise or project-wise (as mentioned in the Limited Tender Enquiry for each project).

The application process for empanelment- will be conducted through 'Central Public Procurement Portal' (e-procurement), Government of India <https://eprocure.gov.in/eprocure/app>

Factsheet

Name of the work/ Description	:	Facilitating the collection of either or both qualitative and quantitative data for several research projects undertaken by the Centre for Marketing in Emerging Economies (CMEE), IIM Lucknow Noida Campus. In the broad gamut of Digitalization/Marketing of Financial Services, Healthcare, Security, Education, Skill Development, Consumer Affairs, MSME, e-Governance, Oil & Gas, e-commerce, Telecom, Railways, Tourism & Hospitality, Skill & Livelihood services etc.
Period of Contract	:	One Year extendable further up to Two-years (on yearly basis) on mutual consent of both parties i.e. empanelled agency & IIM Lucknow (The performance of the empanelled agency will be reviewed after awarding of each project and if the performance of the agency is not found to be satisfactory, IIM Lucknow reserves the right to terminate the empanelment without any notice)
Estimated Project Value (approx.)		Up to Rs. 25 lakhs for each project

	<p>Depending upon the research project given by CMEE's client It may be noted that this empanelment does not guarantee any minimum business to any of the empanelled agency. The tender value will depend upon the project sanctioned to CMEE, IIM Lucknow, Noida Campus. However, utilization of services of the empanelled agencies will be at the discretion of the IIM Lucknow.</p>
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On behalf of the Director, Indian Institute of Management Lucknow, interested and eligible agencies/firms/bidders are hereby invited to submit the Proposal / Bid for 'Empanelment of Marketing Research Field Agencies for Facilitating Research Projects' as per details given below :

1. The interested agencies shall submit all the required supporting documents as per RFP .
2. The details of the interested agencies shall be as per the format mentioned in **(Annexure-A)** .
3. The Director, Indian Institute of Management Lucknow reserves the right to reject one or all the Proposals received against this RFP without assigning any reason whatsoever. No claim shall be entertained on this account .
4. **The validity of the RFP will be 120 days** from the date of opening of Proposals .
5. Incorporating additional conditions are liable to be rejected .
6. Payment will be milestone based, and, will be linked to the milestones determined by CMEE's end client for whom we undertake the project . Under no circumstances shall the payment exceed 50% of contracted value until submission of data and analysis .
7. **No support of manpower, material, cartage or transport etc . will be provided by the institute . All these have to be arranged by the agency at their own cost .**
8. There will be no Security Deposit for empanelment . However, after empanelment, whenever, the work will be awarded to any of the empanelled bidders/agencies, they will be required to submit a Performance Security Deposit equivalent to 3-10% of the contract value (exact percentage will be mentioned in the Limited Tender Notice as per rules/practice of the Institute) . The Performance Security Deposit shall be deposited as security within fifteen days from the Issue of Intent/Work Order . Security Deposit shall be in the form of 'Demand Draft' / FDR / PBG in favor of Indian Institute of Management Lucknow-Noida Campus, payable at Noida . The security money will be released to the agency after 2 months of the satisfactory completion of the contract . No interest will be paid on the held deposit with the institute either in form of security deposit . In case of breach of contract by the bidder, the security deposit will be forfeited apart from other legal/ administrative actions including debarring / blacklisting of the agency .
9. **Initially, the agencies will be empaneled for a period of one year and extendable further period of two years (on yearly basis) . However, both the Institute and the shortlisted agency shall have the right to end the contract by serving notice in writing to the other party, three months in advance . The performance will be reviewed annually and periodically .**
10. **Pre-Bid Meeting :** CMEE shall hold a pre-bid meeting via online mode with the prospective agencies on the date and time specified in the factsheet . The interested agencies will have to ensure that their queries for the Pre-bid meeting should reach [CMEE through google form \(link available above\)](#). Click here *with ctrl button* to open the link . No other mode of communication will be entertained .
11. **Responses to Pre-Bid Queries and Issue of Corrigendum :** The CMEE will endeavor to provide timely responses to all queries through corrigendum (no individual response will be sent). At any time prior to the last date for receipt of bids, CMEE IIM Lucknow may for any reason, whether at its own initiative or in response to a clarification requested by a prospective interested agencies, modify the RFP documents by releasing a corrigendum . The corrigendum (if any) & clarifications to the queries

from all interested agencies will be posted at <http://eprocure.gov.in/>, <http://iimlcmeel.org/> and www.iiml.ac.in. Any such corrigendum shall be deemed to be incorporated into this RFP document. In order to provide prospective interested agencies reasonable time for taking the corrigendum into account, CMEEL IIM Lucknow at its discretion may extend the last date of the proposal submission.

12. Proposal/ bid shall be submitted online at (Central Public Procurement (CPP) Portal Website: <http://eprocure.gov.in/>), by last date & time for submission of Bids (mentioned on the first page), documents in .pdf format. Manual bids or the bids submitted by telex/telegram/fax/email will not be accepted under any circumstances. No correspondence will be entertained on this matter.
13. Interested agencies should refer to the CPP portal for instructions for registering on the CPP portal, preparing their bids in accordance with the requirements, and submitting their bids online on the CPP portal. The proposals/bids uploaded by the interested agencies without required supporting documents as per RFP notice shall be rejected. The interested agencies incorporating additional Terms & Conditions are also liable to be rejected.

For Indian Institute of Management Lucknow

Application Timeline (Important Dates)

Activity	Date
Date of Issue of RFP	28th September, 2021 (Tuesday)
Last date to submit Pre-bid enquiries, if any,	08th October, 2021 (Friday) The query to be submitted only through Google Forms. To submit your query, please click here
Pre-Bid meeting Date & Time	11th October, 2021 (Monday) 02 : 30 pm – 04 : 30 pm Any changes in the date/time will be communicated accordingly
Release of response to queries	18th October, 2021 (Monday) Responses will be released on http://eprocure.gov.in/ , www.iimlcmee.org and www.iiml.ac.in
Last date of submission of Proposal/bid online	28th October, 2021 (Thursday)
Date of opening of the Technical Bid	29th October, 2021 (Friday)
Date for Online Presentation (for the applicants who have qualified the Technical Bids)	To be communicated later to bidders qualifying in Section-A

1. INTRODUCTION

About IIM Lucknow

Indian Institute of Management Lucknow (IIM Lucknow) an autonomous academic institute took the lead in establishing a satellite campus at Noida, suburb of New Delhi in the National Capital Region . The Noida Campus has a full time dedicated pool of faculty and has been developed as a centre of excellence in the area of executive education .

About CMEE

Centre for Marketing in Emerging Economies (CMEE) was established as a Centre for Excellence at IIM Lucknow, Noida Campus in the year 2012 . It is a lively resource centre for scholars, academicians, marketing research practitioners and corporations from around the world having interest in emerging economy markets . CMEE' s vision is to be globally recognised as *Centre for Marketing* that studies, undertake and educates the consumers, business and public policies towards marketing in Emerging Economies .

IIM Lucknow Noida Campus invites Proposals from reputed *Marketing Research Field Agencies* for facilitating the collection of either or both qualitative and quantitative data for several research projects to be undertaken by the Centre for Marketing in Emerging Economies (CMEE) , IIM Lucknow Noida Campus .

EMPANELMENT OF MARKETING RESEARCH FIELD AGENCIES

1.1. SCOPE OF WORK

- a. To facilitate the collection of either or both qualitative and quantitative data in an area as finalized by the principal investigator of the project .
- b. To render the following set of services (Details of the professionals to be enclosed as **(Annexure C)**)
 1. **Quantitative data collection**: Face-to-Face quantitative data collection including CAPI– Computer Aided Personal Interviews) , CATI (Computer Aided Telephonic Interviews) and CAWI (Computer Aided Web Interviews) including sampling services that are representative of target population of interest in specific client projects .
 2. **Qualitative data collection**: Identifying, recruiting target respondents and conducting in-depth interviews (IDI) or Focus Group Discussions (FGDs) as per sampling plan proposed in specific client projects. These interviews may be conducted Face-to-Face or online as per project design.
 3. **Translation services**: The agency should have access to professionals who possess an in–depth knowledge of the English language, perform translation of written text from Local language (s) into English (and vice versa) [*with attention to fact and nuance, so that the intent and tone of the original meaning is preserved*] in various business and social settings. He/she should edit, standardize, proofread, revise and finalize translated material . **A minimum of Bachelor' s degree in English [preferable knowledge in local language (s)] and** awareness about specialized information within strict accuracy and format requirements, and must possess the highly specialized knowledge of technical writing and translation . One should possess the desired experience of 2–3 years in similar area . Input documents (translated script) to be submitted to the project investigator in hard and soft copy .
 4. **Transcription services** : The agency should have access to professionals who could create written records of audio and video recordings, meetings, live conversations and focus group/ mini group discussions . Their finished products must demonstrate clear formatting and easy–to–read content . A minimum of Bachelor' s degree in English and desirable experience of 2–3 years in preparation of

transcripts. Input documents (transcript script) to be submitted to the project investigator in hard and soft copy.

5. **Basic & advanced tabulation services:** These professionals should prepare, compile and sort documents for data entry. The data should be entered from source documents into prescribed computer database, files and forms, the completed documents should be stored in designated locations. A minimum of Bachelor's degree in English and desirable experience of 2–3 years in data analysis. Input documents (sorted and coded data) to be submitted to the project investigator in hard and soft copy.
- c. **The shortlisted agencies shall be asked to quote timely for the specific task as assigned by the client. Fresh quotes will also be asked for various types of services (data collection, transcription, translation, tabulation) depending on the project requirement.**
- d. The agency shall carry a need assessment to understand the requirements of the data collection system at the project site before discussing with the principal investigator.
- e. The team from the agency after the need assessment shall meet with the principal investigator of the project to discuss and agree/understand the research proposal, objectives, discussion guides, and fieldwork plan before initiating the fieldwork.
- f. The agency shall identify and screen potential respondents based on the inclusion criteria (as agreed by the principal investigator of the project).
- g. The agency shall design the questionnaire, data analysis and data punching in consultation with the principal investigator of the project.
- h. The agency shall be responsible to facilitate and record the interviews (FGDs and IDI) pertaining to the discussion guide.
- i. The agency shall verify all transcriptions by its researchers before final submission to the principal investigator of the project.

6. Moderation Services

Empanelled agencies will provide credible professional(s) for moderation service(s) towards the respective research project(s)

The scope work of moderation service is given below.

- a. The moderator shall facilitate the collection of either or both qualitative data in an area as finalized by the principal investigator of the project,
- b. The moderator shall carry a need assessment to understand the requirements of the data collection system at the project site in consultation with the principal investigator of the project.
- c. The moderator after the need assessment shall meet with the principal investigator of the project to discuss and agree/understand the research proposal, objectives, discussion guides and fieldwork plan before initiating the fieldwork.
- d. The moderator shall identify and screen potential respondents based on the inclusion criteria (as agreed by the principal investigator of the project.).
- e. The moderator shall be responsible to facilitate and record the interviews (FGDs and IDI) pertaining to the discussion guide in the appropriate local language of respondents.
- f. The moderator shall design the questionnaire, data analysis and data punching in consultation with the principal investigator of the project.

- g. The empanelled moderators shall be asked to quote timely for the specific task as assigned by the client.

Moderation Deliverables

- a) Input documents including feedbacks forms, questionnaire, discussion guide and analysis plan
- b) Submission of the action plan to provide a sustainable & scalable output as per the research objectives
- c) Submission of integrated final research report in word format
- d) Presentation on the findings of the research

2. ELIGIBILITY CRITERIA

S. No	Eligibility Criteria	Supporting Proof/Documents required
1.	The interested agencies shall be a Registered Legal entity in India and operating for the last 3 years on the last date of the submission of the bid to IIM Lucknow	Copy of registration certificate indicating date and incorporation status and address .
2.	The entity should be a Management/Strategic consulting/market research agency having pan-India presence, having the ability to reach respondent set across Urban and Rural India and should also have a proven quantitative and qualitative research capabilities .	MoA/AoA or the relevant document stating the desired domain in its objectives .
3.	The entity should be registered with GST Department and should have a valid PAN .	Copy of GST Registration certificate Copy of PAN
4.	Interested agencies shall have an overall turnover of over Rs. 50 Lakh combined for the last three financial years [2018-19, 2019-20 and 2020-21 OR 2017-18] which should include Rs . 10 Lakh each year for agencies with similar projects .	Copy of Balance Sheet showing annual turnover <u>OR</u> A certificate mentioning Annual Turnover from the statutory auditor
5.	Interested agencies must have completed minimum 2 assignments of consumer research having an element of F2F and/or Telephonic and/or Web surveys using computerised methods for data collection .	Details of the Project undertaken as per Annexure-B Copy of work order + self-certificate of completion indicating the scope of work, deliverables and cost <u>OR</u> Completion certificate from Client indicating the scope of work, deliverables and cost .

6	Due to the present scenario, as per Government of India orders, the agencies / bidders may participate in the tender / RFP without Earnest Money Deposit (EMD) by submitting a filled, signed & stamped 'Bid-Security Declaration as per Annexure-D	The agencies / bidders are required to submit filled, signed & stamped 'Bid-Security Declaration as per Annexure-D
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3. MODE OF SELECTION

- a. The technical evaluation criteria will consist of two sections i.e., **Section A: Organizational capacity & Financial capacity** and **Section B: Approach and Methodology**.
- b. Agencies qualifying **Section A** by meeting the minimum eligibility criteria mentioned above, will be called to present their approach and methodology (**Section-B**).
- c. The approach and methodology document delineating the points mentioned in **Annexure C**. The agencies/ bidders scoring a minimum of 50 marks in the approach and methodology section will be termed as the *technically qualified agencies and will be empanelled for participating in Limited Tender Enquiries*. The Technically qualified agencies / bidders will be empanelled for each of the services i.e. CAPI, CATI and CAWI as well as for Qualitative moderation.
- d. After empanelment of the agencies, it will be at the discretion of IIM Lucknow whether to invite bids from the empanelled bidders through limited tender enquiry or from all available agencies through open tender or any other means. There are possibilities that part-wise bids will be invited and the Lowest bidder may be decided part-wise or project-wise (as mentioned in the Limited Tender Enquiry for each project).
- e. Upon grant of a related project to IIM Lucknow, the Institute will invite Financial bids for each project or part of the project from the empanelled bidders/Agencies, through Limited Tender Enquiries on CPP portal or any other means, as deemed fit by the Institute.
- f. The Financial Bids from the empanelled bidders/ agencies may be invited at short notice. Among the responses received, the bidder / agency quoting the lowest rate will be declared as the Lowest Bidder (L-1), and, will be issued the Letter of Intent cum Work Order, to conduct the work. In case, two or more agencies quote the same lowest rate, the agency with a higher Annual Turnover as declared in response to this RFP, will be awarded the work.
- g. The next lowest interested agencies if willing to match the bid amount of the lowest interested agencies shall be retained as a potential alternative suppliers for services.
- h. The work may be allocated to more than one agencies, depending upon the project requirement and rate quoted by the agency. This will be clarified at the time of inviting the Financial Bids.
- i. **NOTE: This RFP is for empanelment of bids and the bidders / agencies does not need to quote rates. However, as per the requirement of the portal, the bidders/ agencies are required to fill and upload an Excel sheet (Named BOQ/ Financial bid) on the portal under Financial Bid/ BoQ Section. In this excel sheet, the bidders / agencies may fill their name**

at respective place and '1 (one)' under the column rate'. This '1' will indicate that the bidders / agency understands all terms & conditions of the RFP and agree to these conditions and in case they are empanelled, they will participate in the future limited tender enquiries in this regard, as & when floated by the Institute .

Annexure-A

SECTION-A OF THE TECHNICAL EVALUATION
Details of the Marketing Research Field Agency (along with self-declaration)

<u>S. No.</u>	<u>Particulars</u>	<u>Details</u>												
1	Name of the Firm :													
2	Address													
3	Telephone Number													
4	Legal Status of Agency and year of Incorporation (Enclose copy of registration certificate indicating date and incorporation status and address) .													
6	Name of the key leadership (Founder, Partners, Directors . Owners)													
7	GSTN (Enclose copy of certificate)													
8	PAN (Enclose copy of certificate)													
9.	<u>Annual Turnover of the company</u> (Documentary proof i.e. CA certificate, Audited Balance sheet and Profit & Loss account to be enclosed) :	<table border="0"> <tr> <td>Financial year</td> <td>Annual Turnover (Rs.)</td> </tr> <tr> <td>FY 2018-19</td> <td>: Rs.</td> </tr> <tr> <td>FY 2019-20</td> <td>: Rs.</td> </tr> <tr> <td>FY 2020-21 or 2017-18</td> <td>: <u>Rs.</u></td> </tr> <tr> <td>-</td> <td>Total annual turnover (3 yrs):</td> </tr> <tr> <td></td> <td>Rs. _____</td> </tr> </table>	Financial year	Annual Turnover (Rs.)	FY 2018-19	: Rs.	FY 2019-20	: Rs.	FY 2020-21 or 2017-18	: <u>Rs.</u>	-	Total annual turnover (3 yrs):		Rs. _____
Financial year	Annual Turnover (Rs.)													
FY 2018-19	: Rs.													
FY 2019-20	: Rs.													
FY 2020-21 or 2017-18	: <u>Rs.</u>													
-	Total annual turnover (3 yrs):													
	Rs. _____													
10	Interested agencies must have completed minimum 2 assignments of consumer research having an element of F2F and/or Telephonic and/or Web surveys using computerised methods for data collection .	<p>Details of the Project undertaken as per Annexure-B</p> <p>Copy of work order + self-certificate of completion indicating scope of work, deliverables and cost</p> <p>OR</p> <p>Completion certificate from Client indicating scope of work, deliverables and cost .</p>												
11	Bid Security Declaration The agencies / bidders are required to submit filled, signed & stamped 'Bid-Security Declaration as per Annexure-D	<p>Have your enclosed Bid Security Declaration: Yes / No</p> <p>If yes, mention page number _____</p>												

Declaration :

1. I/ We hereby certify that my/our firm/Company/Society/Trust has not been debarred/ blacklisted by any State Government/Government of India/Govt. Departments and/or agencies such as UN/bilateral/multi-lateral funding/partner agencies and corporates including CPSEs, at any time for services of any description .
2. I/ We hereby declare that no relevant information has been omitted/ withheld in the process of furnishing the information with respect to this RFP .
3. I/We have read and examined this RFP document while submitting our response . Further, it is understood that this RFP is only an exercise for possible empanelment for the future Research Project (s) however it does not confer any right to any party submitting Proposal / bid for further consideration in the project allotment .
4. I/we understand that if we use any unfair means for the empanelment or to get the assignment in future or disclose the information to other parties, our proposal/ empanelment would be cancelled at any time during the contract period and the agency will be debarred/ blacklisted for participation in future for a period of 2-3 years and security deposit, if any, will be forfeited

For and on behalf of the :

M/s :

Signature of Authorized Representative (with the seal of the Agency)

(Supported by authority letter) :

Name :

Designation :

Place :

Date

Signature of the Bidder

Annexure-B**Details of Project Undertaken**

Assignment Name	
Country	
Location within Country	
Duration of Assignment	From : _____ To : _____
Name of Client	
Approximate value of the contract :	
Address	
Approximate value of the services provided by your firm under the contract	
No . of person months of the assignment :	
Name of joint venture partner or sub consultants , if any	
No . of months of Professional staff involved under the contract	
Name of senior staff (Project Director / Coordinator, Team Leader) involved and functions performed	
Narrative Description of the Project :	
Description of Actual services provided by company staff	

Date

Signature of the Bidder

Annexure - C**SECTION-B OF THE TECHNICAL EVALUATION**

	<p style="text-align: center;">APPROACH & METHODOLOGY (To be presented by bidders / agencies, who qualify in Section-A of the Technical Evaluation)</p> <p>Expected Duration of the presentation: _____ (to be communicated later) Expected Number of slides: _____ (to be communicated later)</p>	<p style="text-align: center;">Max. Marks</p>
	<p>1. Introduction of the Agency:</p> <p>1. 1 Brief of the Agency</p> <p>1.2. Technical capability- Relevant experience, skills & competencies in executing marketing research projects (do mention number of years of experience)</p> <p>1.3 Professional expertise, knowledge and experience with similar projects, contracts, clients and consulting assignments in last 3 years (2018-19, 2019-20 & 2020-21) having value of more than 50 Lakhs; (Must contain number of projects completed – IIM Lucknow may seek documentary evidence, if deemed fit)</p> <p>1.4 Presence of the organisation for data collection in how many cities (Documentary evidence may be sought by IIM Lucknow)</p>	<p style="text-align: center;">30</p>
	<p>2. Data Collection Strength</p> <p>2.1. Data collection infrastructure capacity and quality</p> <p>F2F: Operational offices, permanent staff, quality management team CATI: Dedicated CATI centre, use of OBD services with ability to record Online: Panel members, software for recruitment, online monitoring tools, no. of interviews executed</p> <p>2.2. Interview recruitment and training procedure for F2F and CATI</p> <ul style="list-style-type: none"> • Selection procedure of the interviewers • % of interviewers who are fresh (less than 1 year, 1-5 years, >5 years) • % of interviewers blacklisted for poor interview quality year wise for last three year & the reasons for their removal • Interviewer training method used • Respondent recruitment procedure (respondent identified and selected by the panel) in case of online data collection, Any ISO method involved for their selection <p>2.3. Interviewer monitoring mechanism for status on fieldwork progress including quota achievements. For online appropriate quality control</p> <p>2.4. Quality control mechanism including % accompaniments, % back checks and other technological methods used to identify and remove invalid data</p> <p>2.5. Sampling procedures enforced and methods used to validate that said sampling procedures are followed by data collection staff</p> <p>2.6. QC methods in place to identify root causes and implement corrective and preventive actions</p> <p>QC standards and audits in place including any independent certification</p>	<p style="text-align: center;">50</p>
	<p>3. Analysis capabilities</p> <p>3.1. Data analysis infrastructure capacity and quality</p> <p>3.2. Data punching capabilities for Paper & Pencil surveys & quality procedures deployed</p> <p>3.3. Quality control mechanism in place to test CAPI/CATI data and other methods used to identify and remove invalid data</p> <p>3.4. Data analysis software availability, usage and output format capabilities</p>	<p style="text-align: center;">20</p>

3.5. Types of analysis capabilities (Cross tabulations, advanced analytics – an exhaustive listing of tools and techniques as well as examples of analysis undertaken)	
4.1 if the bidder / agencies has ISO Certification 9000:9001 and/or ISO 20252 for Marketing Research. The agency has to attach the certificate	
<p>5.1: Does the bidder / agency have empanelment with other government departments or carried out similar work in Govt dept.? If yes, share a few prominent names:</p> <p>5.2 If the bidder conducts CAPI (F2F), share details of offices and permanent staff it has. If CATI, please share details of operators and OBD workstations in how many locations and if CAWI, share details of respondent panel size and spread details,</p> <p>5.3 Share detail of the data collection mechanisms employed by the bidder</p> <p>5.4 Share examples of Research Projects executed across varied geographies and demographics, if any.</p> <p>5.5 Share details of the Agency's Management and Research Team</p> <p>5.6 Any other relevant information desired to be furnished by the agency</p>	
Total Marks	100

Note: Agency/bidder scoring a minimum of 50 marks will be termed as Technically Qualified Agency.

Annexure - D

Bid Security Declaration Form
<on the Letterhead of the Bidder>

To,

<Date>

Director,
Indian Institute of Management Lucknow

Dear Sir,

I/We, the undersigned declare that: I/We understand that bids must be supported by a Bid Security Declaration.

I/We accept that I/We may be disqualified from bidding for any contract with IIML for a period of two years from the date of notification if I am /We are in a breach of any obligation under the bid conditions, because I/We

a) have withdrawn/modified/amended, impairs or derogates from the tender, my/our Bid during the period of bid validity or its extended period, if any; or

b) having been notified of the acceptance of our Bid by the purchaser during the period of bid validity:

(i) fail or reuse to execute the contract, if required, or

(ii) fail or refuse to furnish the Performance Bank Guarantee, in accordance with the Instructions to Bidders.

c) If the bidder is found indulging in any corrupt, fraudulent or other malpractice in respect of the bid;

I/We understand this Bid Security Declaration shall cease to be valid if I am/we are not the successful Bidder, upon the earlier of

(i) the receipt of your notification of the name of the successful Bidder; or

(ii) thirty days after the expiration of the validity of my/our Bid.

Date: _____

Place: _____

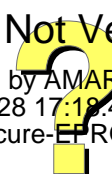
STAMP & SIGNATURE OF THE BIDDER

Document Checklist

S. No.	Particular	As per Annexure	Yes/No
1	Details (Name, Address) and profile of the company	A	Yes/No
2	Copy of registration certificate indicating date and incorporation status and address	A	Yes/No
3	Legal Status of Agency and year of Incorporation: <i>(Enclose copy of registration certificate indicating date and incorporation status and address).</i>	A	
4	MoA/AoA or the relevant document stating the desired domain in its objectives	A	Yes/No
5	Copy of GST Registration certificate and GSTN	A	Yes/No
6	Copy of PAN	A	Yes/No
7	Copy of Balance Sheet showing annual turnover OR A certificate mentioning Annual Turnover from the statutory auditor	A	Yes/No
8	Annual Turnover of the company of the previous three financial years (Documentary proof i.e. CA certificate, Audited Balance sheet and Profit & Loss account to be enclosed):	A	Yes/No
9	Details of the Project undertaken: Copy of work order + self-certificate of completion indicating the scope of work, deliverables and cost, OR Completion certificate from Client indicating the scope of work, deliverables and cost.	B	Yes/No
10	The agencies / bidders are required to submit filled, signed & stamped 'Bid-Security Declaration	D	Yes/No
11	Duly filled-in, signed and stamped Bid Security Declaration (As per Annexure-D)	D	Yes/No
	Any other relevant documents, mentioned in the annexure towards supporting application		

Signature Not Verified

Digitally signed by AMARDEEP SINGH
Date: 2021.09.28 17:18:46 IST
Location: eProcure-EPROC



Organization	Indian Institute of Mangement Lucknow		
Tender Ref. No.	IIMLNC/MR AgencyCMEE/2021/008		
Tender ID	2021_IIML_650472_1		
Published Date	28-Sep-2021 6:00 PM		
Bid Submission End Date	28-Oct-2021 3:00 PM		
Technical Bid opening date	29-Oct-2021 3:30 PM		
RFP of Empanelment of Marketing Research Field Agencies for Facilitating Research Projects			
Response to Pre-Bid Queries			
Pre-Bid meet conducted on 11-Oct-2021 02:30 pm - 04:30 pm Online via Zoom			
Company	Query in detail	Refer clause	Response
A	1. We are registered in MSME portal on 2020 , Is having any advantage / preference to in the RFP for empanelment 2. We have associate office in some of the regions . Can we apply for same.	Ref. 2: Eligibility Criteria	1. Declaration for EMD exemption. Bidders reigsted with MSME can either provide a valid MSME certificate OR Bid Security Declaration. 2. No region-specific requirement
B	There are specific research methodologies for every kind of problem, and we have different teams to work on each of these. It would help to understand if there is some kind of direction on research at this moment or not. Thanks for the opportunity.	Ref. 1.1: Scope of Work	Once CMEE receives a research project, the research methodology/data collection technique and related other frameworks will be decided depending on the nature and type of the project and communicated accordingly to the empaneled agencies
C1	How to access the details of a particular company after the search, I could get the list. But, I could not access further; I have DSC dongle. How should i register here?	Ref. Factsheet, 2: Eligibility Criteria, e-procure helpdesk	The e-procure helpline can be contacted for any technical issues faced while using DSC dongle/submitting application
C2	Less than three years of operation of company	Ref. 2: Eligibility Criteria	The company with minimum three years of operation are eligible to apply
D	1) How many companies will get empaneled (2)As it is a tender for emerging economies will they pass on international projects to empanelled agencies (3) Is ISO 20252 for Marketing Research mandatory?	Ref. Factsheet: Nature of Work, Refer ,and, Annx. - C: Section-B, of Technical Evaluation, point 4.1	1. There is no such set limitations on the number of companies to be empaneled. 2. This RFP preferably focused upon domestic research/data collection projects. However, if any need arises for international projects, we will share with its empaneled agencies. 3. ISO 20252 is not mandatory.
E	1. Please state if there are any specific human resource requirement apart from the qualifications, in terms of strength of required team. 2. With regards to the translation services, please enumerate what are the prospective local languages. 3. Please state whether the Input Documents (translated script, transcript script, sorted and coded data) are to be submitted with the proposal.	Ref. 1.1: Scope of Work, 2: Eligibility Criteria, Ref. Annx. - C: Section-B, of Technical Evaluation, point 4.1,	1. Not specific as such.The team members of the research agencies should be qualified, proficient and having experience of research related activities as mentioned in the RFP ddocument. 2. The requirement of scheduled language expertise will be solicited depending upon requirement of project, once received 3. The documents (in soft and hard copies) are need to be submitted to the Principle Investigator

F	<p>1. Deliverables and payment terms. What will be the final deliverables? Do we need to make a physical presentation of the analysis? Will there be multiple rounds of presentation? When will the final amount released?</p> <p>2. Nature of submission Can we submit our proposal through a consortium? Can we outsource data collection to another agency?</p> <p>3. Professional expertise, knowledge and experience What should be the nature of the project? <ul style="list-style-type: none"> • Should it be full project? Including creating the research design, data collection, data analysis and report writing? • Should it be only data collection projects? • Should it be only analytics projects? </p> <p>4. Audit Agency Can we submit our proposal only for the audit of fieldwork and research design? We have strong credentials in Audit of fieldwork and research design and have audited the fieldwork of India's largest sample survey research. We have also audited the research design for India's foremost private sector companies and a diversified conglomerate</p>	Ref. Factsheet.,and, 1.1 Scope of Work,and, Annexure-B, C (Technical Bid)	<p>1. Deliverables will vary by nature of project. 2. CMEE will be entertaining the application recieved on the name of the bidder only 3. The research and/or data collection framework will be communicated once the research project is received. The need will be evaluated depending on respective project(s) requirement 4. The company needs to duly submit all its information, as applicable.</p>
G	<p>(1) What is the role of CMEE in any project? (2) What type of projects you will allocate to agencies? (3) We only want to impanel for CAWI, so can we quote in this manner? (4) In Annexure-B, we do not want to mention the name of client, can we input industry our client is involved in? (5) We are not able to find the link to upload RPF on CMEE website. Please share more details.</p>	Refer Factsheet. Refer 1.1 Scope of Work, Refer, Refer Annexure-B, C (Technical Bid)	<p>1. CMEE will be receiving the project from the stakeholder, and therefore will be governing and coordinating the project activities. 2. As and when in need basis, 3. The complete details can be provided, where and as applicable, 4. Documentary proof needs to be submitted towards the work done for the said company. 5. Contact helpdesk of e-procure portal</p>
H	<p>We at IQVIA, conduct more than 120 projects across different stakeholders dealing mainly with Healthcare/ consumer research. Can you provide some details in terms of type of stakeholders who are normally included in your research this will help us to evaluate feasibility and provide right budget. Any estimate around yearly revenue/ number of projects conducted will be helpful along with details of current vendor for MR, if possible</p>	Refer: 1.1: Scope of Work & Factsheet	<p>The nature of project/target respondents will vary according to the work commissioned to CMEE, which shall be diverse in nature</p>