

## REQUEST FOR PROPOSAL (RFP)

### *Title of Services*

**CONDUCTING COMPUTER-BASED EXAMINATION FOR  
THE INSTITUTE OF COST ACCOUNTANTS OF INDIA  
FOR ALL TAXATION COURSES  
DURING THE YEAR 2024 TO 2027**



**THE INSTITUTE OF COST ACCOUNTANTS OF INDIA  
(Statutory body under an Act of Parliament)  
CMA Bhawan, 12 Sudder Street, Kolkata - 700016  
Phone: 033-40364717/ 98 / 11  
Website: [www.icmai.in](http://www.icmai.in)**

**SECTION-1 LETTER OF INVITATION**

**Subject:** Request for Proposal (RFP) for selection of Agency for **CONDUCTING COMPUTER-BASED EXAM** FOR ALL THE TAXATION COURSES OF THE INSTITUTE OF COST ACCOUNTANTS OF INDIA, DURING THE YEAR 2024 TO 2027

Dear Sir/Madam,

- 1.** The Institute of Cost Accountants of India (hereinafter referred to as "Institute") intends to conduct Online Computer Based Test (CBT) in centre-based mode or through remote proctoring mode from the home location of the candidate for all the Taxation Courses conducted by the Tax Research Department of the Institute. The selection of the mode of exam [Centre Based / Home Based] would entirely be the discretion of the Institute. **The Institute, for the above purpose, intends to engage a Professional Agency to provide services under contract terms for Two years extendable to another one year based on satisfactory performance at the same rate and terms and conditions.**
- 2.** Selection Process: Participants would be first Technically Evaluated. Bidders scoring 80 marks and above in the technical evaluation would qualify for participation in the Financial Bid. The lowest bidder in the Financial Bid will be awarded the contract.
- 3.** The RFP includes the following documents:
  - Section 1 - Letter of Invitation
  - Section 2 - Instructions to Agency
  - Section 3 - Technical Proposal - Standard Forms
  - Section 4 - Financial Proposal - Standard Forms
  - Section 5 - Terms of Reference
- 4. Earnest Money Deposit (EMD):** Earnest Money amounting to **Rs. 18,000/-** (Rupees Eighteen Thousand only) in Demand Draft drawn in favour of "THE INSTITUTE OF COST ACCOUNTANTS OF INDIA", payable at Kolkata should be submitted along with the Proposal.
- 5.** RFP Document can be downloaded from the website [www.icmai.in](http://www.icmai.in)
- 6.** The bid shall be submitted in two separate sealed envelopes, namely Technical Bid (Annexure -1) and Commercial Bid (Annexure-2) in separate sealed envelopes and the Demand draft of Rs 18,000/- should be enclosed inside the envelope of the Technical bid. Both of Technical and Commercial bids, duly stamped by the bidder, must be submitted at the same time, in another separate sealed envelope superscribed "TRD/ Exam / 2024-27".
- 7.** Proposal is liable to be rejected for the following reasons–
  - (i) Absence of E.M.D.
  - (ii) Rate quoted are not as per the Prescribed Format.
  - (iii) Incomplete, unsigned, unstamped, illegible or mutilated.
  - (iv) Void for ambiguity/uncertainty.
  - (v) Containing incorrect/unsubstantiated information.
  - (vi) The Institute may waive any minor informality or no-conformity or irregularity in a Bid, which does not constitute a material deviation. The decisions of the Institute in regard to the deviation being material or not shall be final and binding.

## **Basic Requirements: -**

- 1. The Contract is to commence from the date of signing the Contract with the Agency and shall continue initially for a period of two years unless it is curtailed or terminated by the Institute owing to deficiency of service, substandard of quality, breach of contract, reduction or cessation of the requirement of work. The contract may be extended on same rate and terms and conditions for another one year based on satisfactory performance of the Agency.**
2. The Contract, if not extended, shall automatically expire after two years from commencement of the Contract.
3. The Agency shall not be allowed to transfer, assign, pledge or sub-contract its rights and liabilities under this contract to any other Agency/Contractor without the prior written consent of this Institute.
4. Bidder should have successfully conducted CBTs, in a single day in single / multiple sessions, on all India basis in 100 or more cities covering at least 20 states; and should have the ability to take at least 100,000 candidates in a single shift on pan India basis.
5. The Agency will be bound by the details furnished by it to the Institute, while submitting the tender or at subsequent stage. In case, any of such documents furnished is found to be false at any stage, it would be deemed to be a breach of terms of contract making the firm liable for legal action besides termination of contract.
6. Financial bids of only those bidders who are technically qualified shall be evaluated. At the time of opening of financial bids, the shortlisted bidders may be called at the meeting by the concerned tender committee.
7. The agreement can be terminated by either party giving 3 (three) months' notice in advance. If the service provider fails to give three months' notice in writing for termination of the agreement, performance guarantee submitted by the service provider shall be forfeited in favour of the Institute.
8. Institute may ask the documentary evidence in respect of payment of statutory liabilities as and when required to be furnished.
9. The quoted rates of offer will be valid for a period of 90 days.
10. Before award of contract, all original documents may be checked by the Institute and at that time attested photo copies are required to be furnished.
11. The Cost of Tender Document is NIL. The tender document may be downloaded from the website for use.
12. The tender document to be dropped in the Tender Box available at the Ground floor, CMA Bhawan, 12 Sudder Street, Kolkata 700016
13. In case of any query related to the Tender Document, please contact **CMA Tinku Ghosh Das /CMA Priyanka Roy, 033- 40364798 / 17, 1<sup>st</sup> Floor, CMA Bhawan, 12 Sudder Street, Kolkata 700016.**

## Essential Requirements:

1. The Tenderer/Applicant should not have been blacklisted by any Government/ Government Agency during its entire period of existence. The Tenderer/Applicant shall submit a certificate in this regard;
2. The Tenderer/Applicant should be a registered organization and working in the State;
3. The Tenderer/Applicant should have minimum average annual Turnover of Rs. 50 Cr and above in each of the last 3 financial years out of which a minimum of 50% of the turn over should be from online examination /from Computer based exams services.

## Confidentiality

The Bidder and their personnel shall not, either during implementation or after completion of the project, disclose any proprietary, Examination related or confidential information relating to the services, agreement or the Institute's operations without the prior consent of the Institute. The legal liability for breach of confidentiality by the bidder and its employees solely lies with the bidder.

## Financial terms and conditions

1. Financial Evaluation would be made on lowest (L1) basis individually for each category [Centre Based or Home Based] on the basis of service charges quoted by the Tenderer/Applicant. Two different vendors may be chosen for two different formats of conduct of exam. In case, tie is observed in the price bid, the applicant with greater technical score will be considered for the award of contract, if otherwise eligible.
2. Submission of earnest money deposit (EMD) of **Rs. 18,000/-** (Rupees eighteen thousand only) DD in favour of "The Institute of Cost Accountants of India", payable at Kolkata is one of the compulsory conditions for the qualification of technical bid. The bidders who are registered with Micro and Small Enterprises (MSES) as defined in MSE procurement policy issued by the department of micro, small and medium enterprises (MSME) are exempted from the submission of earnest money.
3. The DD towards EMD submitted by the unsuccessful bidders will be returned on or before 30 days after the award of the contract. No interest on EMD will be paid by the Institute.
4. **Performance Security** – to ensure due performance of the contract, performance security of **Rs. 45,000/- (rupees forty five thousand only)** to be paid in Demand Draft drawn in favour of "THE INSTITUTE OF COST ACCOUNTANTS OF INDIA", payable at Kolkata by the successful bidder to whom the contract was awarded. Performance Security should remain valid for a period of sixty days beyond the date of completion of the contract. The performance Security would be refunded to the successful bidder on receipt on completion of the contract. No interest would be paid on the amounts.
5. Bid Security should be refunded to the successful bidder on receipt of Performance Security.
6. If at any point of time during the period of contract, it is observed by the Institute that the service

rendered by the Contracting Agency are not to the satisfaction of the Institute or any terms of contract are violated, the Institute reserves the right to terminate the contract with immediate effect without any notice or compensation thereof.

7. In case of breach of any of terms and conditions mentioned in this tender document, the concerned Committee will have the right to cancel the work order without assigning any reason thereof and the security deposit shall also stand forfeited. An agreement between the Institute and the vendor shall be signed in this regard.

### **Settlement of Dispute**

1. All disputes regarding interpretation of the contents of the Agreement or its implementation shall be resolved by Mutual discussion/reconciliation in good faith by the Agency and The Institute of Cost Accountants of India.
2. This Agreement shall be governed by the Laws of India for the time being in force and subject to exclusive jurisdiction of Courts at Kolkata.

Fully filled up offers/proposals may be sent through courier/speed post along with demand draft/s in favour of 'The Institute of Cost Accountants of India' payable at Kolkata so as to reach on or before **16:00 hrs on 28.02.2024** or may be dropped at the Limited Tender box situated at the ground floor of the Institute at 12, Sudder Street Kolkata - 700016.

## REQUIREMENTS FOR THE JOB

The bidder must comply with the entire requirement as follows:

| Sl. No.  | Basic Requirement            | Specific Requirements  | Document Required  |
|----------|------------------------------|--|--|
| <b>1</b> | <b>General</b>               | The Bidder should be an Agency/Firm/Company registered under the Indian Companies Act, 1956 and should have a registered office in India having minimum 10 years of experience in conducting online examinations.  | copy of Incorporation certificate, Memorandum of Association and Articles of Association |
|          |                              | The consultant / agency should have necessary valid statutory documents like PAN, Goods & Service Tax Registration, valid Trade License and Income Tax Return of last 3 years.   | Documents to be attached   |
| <b>2</b> | <b>Geographical Presence</b> | Bidder should have Test Centers and office PAN India.  | Certificate by Authorized signatory with address of Office                               |
| <b>3</b> | <b>Blacklisting</b>          | The agency should not have been blacklisted by central/state govt. departments/undertakings. The agency should not have any complaints of question paper leakage or mismanagement of exams. The agency should not have any enquiry registered against him in any of the vigilance organization like CBI, EOW, SIT, STF, CVC etc. and certify this with an Affidavit. | Self-Declaration on letterhead to be attached  |
| <b>4</b> | <b>Manpower Strength</b>     | Should have Minimum 50 full time staff directly handling conduct of Online examinations.   | Declaration on Letterhead from HR Head along with EPF Proof.                             |
| <b>5</b> | <b>Turnover</b>              | The Bidder should have minimum average annual <b>turnover of Rs. 50 Cr</b> and above in each of the last 3 financial years out of which turnover of <b>50%</b> from Online exams/from Computer based exams services.   | Audited financial statements (Reports) to be attached with CA certificate                |
|          |                              | The Bidder should be a profit making company and have positive net profit in the last 3 financial years  | CA certificate   |
|          | <b>Technical</b>             | The bidder must have successfully executed 5 (five) online examination on all India basis, in conduct of Computer based Test (CBT) with capability of assessing at least 5000 candidates in a single shift.  | Completion Certificates from the client; OR Work Order + Self certificate of Completion. |
|          |                              | The Bidder should have its own Data Center or Data Center with a partner which should be Cert- in , ISO 27001 certified and Tier III.  | Proof to be submitted  |

|          |                      |  |   |
|----------|----------------------|--|---|
| <b>6</b> | <b>Capability</b>    | The Bidder should be the owner of the application for conducting online examinations and own the complete Source code.   | Self-Certification                            |
|          |                      | The Bidder should be able to upload the Question paper to the centers 30 minutes before the exam to prevent any issues.  | Self-Declaration on letterhead to be attached |
|          |                      | Solution must use 256 bit encryption for question paper transfer and recording of responses and Response time for question / page loading must be less than 0.5 seconds.   | Self-Declaration on letterhead to be attached |
| <b>7</b> | <b>Certification</b> | The bidder must have the following quality, security, product development and service related certifications / arrangements:<br>CMMI Level 5/3 in Development,<br>CMMI level 5/3 in Services<br>ISO 27001, ISO 9001, ISO 20000 | Certification proof to be submitted           |

**INFORMATION SHEET / TECHNICAL BID**

**(To be filled in and submitted by the Applicant along with copies of documents in support of the information furnished by the applicant)**

| <b>INFORMATION SHEET</b> |   |   |                             |
|--------------------------|---|---|-----------------------------|
| <b>Sl.</b>               | <b>Particulars</b>  | <b>Information to be furnished by the applicant</b>   | <b>For use By Institute</b> |
| 01                       | Name of the Tenderer/ Applicant<br>Relation with Company  |   |                             |
| 02                       | Address of Head Office/ Regd. Office with telephone no. Fax no. E-Mail. etc.  | Address:<br><br>Tel No. with STD code:<br>Fax no. with STD Code:<br><br>E-mail address:<br>Contact Persons with designation & also Mobile Number<br>(i)<br>(ii) |                             |
| 3                        | Address of the other offices/ branches with Telephone no. fax no. E -Mail address etc.  | Address:<br><br>Tel No. with STD code:<br>Fax no. with STD Code:<br><br>E-mail address :<br>Contact Persons with designation:<br>(i)<br>(ii)                    |                             |
| 04                       | Ownership pattern (i.e. proprietary concern / Partnership firm / Pvt. Ltd. Co. / Public Ltd Co. etc.(with documentary evidence) |   |                             |
| 05                       | Detailed profile of the organization  |   |                             |
| 06                       | Certified copies of all statutory compliance certificates   |   |                             |
| 07                       | Professional Tax R C No   |   |                             |
| 08                       | Shops & Establishment Registration No.  |   |                             |
| 09                       | Income Tax PAN  |   |                             |

|     |                                    |  |  |
|-----|------------------------------------|--|--|
| 10  | GST no.                            |  |  |
| 11. | CIN No. In case of limited company |  |  |
| 12. | Bank Details                       |  |  |

**MANDATORY DOCUMENTS TO BE SUBMITTED ALONG WITH ANNEXURE – 1**

1. Last three years Audited Profit & Loss A/c and Balance Sheet
2. Last three years Income tax return
3. Last three years' GST return.

Date: \_\_\_\_\_

Place: \_\_\_\_\_

\_\_\_\_\_  
Signature /Authorized Signatory

**Note:**

- (i) Self-attested copies of certificates / documents in support of the information provided above are must and shall have to be annexed with the Expression of Interest.
- (ii) The institute reserves the right to reject any incomplete application without showing any reason.
- (iii) The Institute reserves the right not to empanel any party even on fulfilling the eligibility criteria or postpone or cancel the process of empanelment or terminate the empanelment of any party at any time for the Institute without assigning any reasons in this regard.

## **TECHNICAL EVALUATION CRITERIA**

The following Table depicts the broad technical evaluation criteria used to arrive at the Technical Score for the bidder:

| Sl. No. | Technical Evaluation Criteria   | Max Score | Scoring Pattern             |       |
|---------|---|-----------|-----------------------------|-------|
|         |   |           | Criteria                    | Marks |
| 1       | Legal Structure   | 5         | Partnership/Proprietary     | 1     |
|         |   |           | Private Limited             | 3     |
|         |   |           | Public Limited Company      | 5     |
| 2       | Certification   | 20        | CMMi Level 5 in Development | 5     |
|         |   |           | CMMi Level 5 in Services    | 5     |
|         |   |           | ISO 20000                   | 3     |
|         |   |           | ISO 9001                    | 2     |
|         |   |           | ISO 27001                   | 2     |
|         |   |           | STQC                        | 3     |
| 3       | Overall Employee Strength   | 10        | >= 250 and <=500            | 2     |
|         |   |           | > 500 and <= 1000           | 5     |
|         |   |           | > 1000                      | 10    |
| 4       | Average Turnover of last 3 Financial Years (The turnover should be only of own organization that is bidding for the Tender and not the Group Company) | 10        | >= 50Cr and <= 100Cr        | 3     |
|         |   |           | > 100Cr and <= 200Cr        | 5     |
|         |   |           | > 200 Cr                    | 10    |
| 5       | The bidder should have a minimum turnover from Online exams/ Computer based exams services  | 5         | <=100 Cr                    | 2     |
|         |   |           | >100 Cr                     | 5     |
| 6       | The Bidder should be the owner of the application for conducting online examinations and own the complete Source code.                                | 10        | Owner of Source Code        | 10    |
|         |   |           | License User                | 5     |
| 7       | Experience in CBT - 2,50,000 candidates per exam in 10 cities and 50,000 candidates above in a single session PAN India                               | 10        | >= 2 proof                  | 10    |
|         |   |           | < 2 Proof                   | 5     |
| 8       | Own Data Center or Data Center with a partner which should be Cert-in, ISO 27001 certified and Tier III   | 5         | Own Data Center             | 5     |
|         |   |           | Partner Data Center         | 2     |
| 9       | Have Test Centers and office all across India   | 5         | >20                         | 5     |
|         |   |           | <=20                        | 2     |

|    |   |    |  |    |
|----|---|----|--|----|
| 10 | Technical Presentation:<br>·Envisaged Solution<br>·Approach Methodology<br>·Work Plan/ Contingency Plan<br>·Proposed resource/professionals | 20 | Marks shall be awarded by the Technical Review Consultant/Team | 20 |
|----|---|----|--|----|

**SECTION-2: INSTRUCTIONS TO AGENCY  
Data Sheet**

| Sl. No | DETAILS   |
|--------|---|
| 2.1    | <p><b>Name of the Client:</b> THE INSTITUTE OF COST ACCOUNTANTS OF INDIA (hereinafter called INSTITUTE)</p> <p><b>Method of selection:</b> Two Bid System – Technical and Financial</p>   |
| 2.2    | <p>All the three Parts should be submitted in three separate Sealed Envelopes-</p> <ul style="list-style-type: none"> <li>(i) Earnest Money Deposit (to be submitted in the envelop of Technical proposal)</li> <li>(ii) Financial Proposal</li> <li>(iii) Technical Proposal</li> </ul> <p>Both the envelopes are to be put in another separate sealed envelope superscribing the name of the assignment given below.</p> <p><b>Name of the assignment is:</b> Selection of Agency for CONDUCTING COMPUTER-BASED EXAM FOR THE INSTITUTE OF COST ACCOUNTANTS OF INDIA, ALL TAXATION COURSES DURING THE YEAR 2024 TO 2026.</p> |
| 2.3    | <p>The INSTITUTE will provide the following inputs and facilities:</p> <p>The INSTITUTE will share only the documents available with it regarding the assignment. No other support or facilities will be provided by the INSTITUTE.</p>   |
| 2.4    | Proposals must remain valid for 90 days after the closing date of Tender documents.   |
| 2.5    | Amounts payable by the INSTITUTE to the Agency under the contract to be subject to Indian taxation: Yes   |
| 2.6    | <p>The Proposal submission address is:</p> <p><b>The Convener<br/>Limited Tender Committee<br/>The Institute of Cost Accountants of India<br/>CMA Bhawan,<br/>12 Sudder Street<br/>Kolkata – 700016</b></p>   |
| 2.7    | Proposals must be submitted not later than the following date and time: <b>16:00 hrs on 28.02.2024</b>  |
| 2.8    | (a) The Technical Proposals will, in the first instance, be examined by the INSTITUTE to ascertain fulfillment of eligibility criteria and submission of required documents in support thereof. Bidders who fulfill the eligibility criteria and have submitted all required documents in their Technical Proposal may be invited to make presentations on their Technical Proposal on a date/time to be specified and conveyed by the INSTITUTE. The INSTITUTE / Evaluation Committee may seek clarifications from the bidders and the bidders are   |

|  |   |
|--|---|
|  | <p>expected to respond / provide the information / clarifications within the stipulated time. The failure to provide the information may lead to disqualification of the bidder.</p> <p>(b) <b>Bidders scoring 80 or above in the Technical Evaluation would be eligible for evaluation of the Financial Bid.</b></p> <p>(c) Financial Evaluation would be made on lowest (L1) basis on the basis of charges quoted by the Tenderer /Applicant.</p> |
|--|---|

**SECTION-3: TECHNICAL PROPOSAL - STANDARD FORMS**

**TECH-1:** Technical Proposal Submission Form

**TECH-2:** Submission of Required Documents in Support of Eligibility

**Form TECH-1: Technical Proposal Submission Form**

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[Location, Date]

To: [Name and address of INSTITUTE]

Dear Sir/Madam:

We, the undersigned, offer to conduct [Insert title of assignment] in accordance with your Request for Proposal dated [Insert Date]. We are hereby submitting our Proposal, which includes an original Technical Proposal, and the original Financial Proposal duly sealed in separate envelopes and both the covers put inside another envelope and sealed.

We hereby declare that all the information and statements made in this Proposal are true and accept that any misinterpretation contained in it may lead to our disqualification.

We undertake, if our Proposal is accepted, to initiate the agency services related to the assignment not later than the date indicated in Point Number **2.7** of the Data-Sheet.

We understand you are not bound to accept any or all proposals you receive.

We remain,

Yours sincerely,

|  |  |
|--|--|
| Authorized Signature<br>[In full and initials] |  |
| Name and Title of Signatory                    |  |
| Name of Firm                                   |  |
|  |  |

|                 |  |
|-----------------|--|
| Address         |  |
| Mail Id         |  |
| Phone No        |  |
| Fax No (if any) |  |

## **FORM TECH-2: SUBMISSION OF REQUIRED DOCUMENTS IN SUPPORT OF ELIGIBILITY**

With response to your RFP hosted on your website, the technical bid of our firm for this assignment is submitted herewith along with the following mandatory documents as mentioned in the RFP documents.

| Sl. No. | Documents Need to be Submitted   | Whether Submitted (Tick YES/NO) |    | Relevant Details | Remarks |
|---------|--|---------------------------------|----|------------------|---------|
| 1.      | Earnest Money Deposit (EMD)<br>Demand Draft No.:<br><br>Date:<br><br>Bank Name:<br>Amount: <b>Rs.18,000/-</b><br><br>In favor of:<br>THE INSTITUTE OF COST<br>ACCOUNTANTS OF INDIA<br>Payable at: Kolkata  | YES                             | NO |                  |         |
| 2.      | Documentary evidence in support of being a Company registered before 01 / 04 / 2015 under Companies Act, 2013  | YES                             | NO |                  |         |
| 3.      | Documentary evidence in support of having Annual Turnover for each year of the last 3 years should be above Rs. 50 Crores of which 50% should be from online examination business for each year of last 3 years (Group turnover will not be accepted). (Attach Audited Balance Sheet, P&L Statement and turnover from online exam. | YES                             | NO |                  |         |
| 4.      | Documentary evidence in support of having experience of conducting online examinations since last 3 years of operation with experience of handling a minimum of 3,00,000 examinees per year at a Pan India level for each year in the last 3 years.  | YES                             | NO |                  |         |
| 5.      | Documentary evidence in support of having its own Office located in Kolkata at the time of participating in the tender, the tenderer should have a fully functional office with full-time employees located in their all India   | YES                             | NO |                  |         |

|     |   |     |    |  |  |
|-----|---|-----|----|--|--|
|     | operation.  |     |    |  |  |
| 6.  | Documentary evidence in support of having Online Exam Software with Intellectual Property Rights (IPR) owned by the Tenderer (copyright of the Software source code) (Self- Certified letter).        | YES | NO |  |  |
| 7.  | Documentary evidence in support of having Test Center Infrastructure across 100 Indian Cities.  | YES | NO |  |  |
| 8.  | PAN Card-Details should be submitted with proper attestation  | YES | NO |  |  |
| 9.  | GST Registration Number- Details should be submitted with proper attestation  | YES | NO |  |  |
| 10. | Documentary evidence in support of having quality certification such as ISO 9001:2015 or equivalent   | YES | NO |  |  |
| 11. | Provide a minimum of 3 client references where similar examination services have been provided (Attach Client Project Brief & proof of project Completion clearly specifying the number of examinees) | YES | NO |  |  |

Yours sincerely,

|  |  |
|--|--|
| Authorized Signature<br>[In full and initials] |  |
| Name and Title of Signatory                    |  |
| Name of Firm                                   |  |
| Address  |  |
| Mail Id  |  |
| Phone No                                       |  |
| Fax No (if any)                                |  |

**Additional Information to be submitted:**

- 1) Brief Overview of the Tenderer Organization – with employee strength
- 2) Past Experience with Govt. and Educational Organizations for conducting online Exam
- 3) List of centers – own and third party, all India list (with seating capacity)
- 4) Security measures at exam centers, servers and data centers
- 5) Security and confidentiality measures for question banks and exam results
- 6) Personnel – TA, administrative, Hardware, Software, Networking deployed at centers
- 7) Backup measures for power breakdowns and internet connectivity
- 8) Disaster Recovery Plan in case of:
  - (i) Power Failure
  - (ii) Machine Problem – Server and Candidate machines
  - (iii) Fire Safety measures
  - (iv) City based events like excessive rainfall, strikes etc
- 9) Certifications at organizational and exam center level – ISO etc.
- 10) Data handover process
- 11) Sanitization measures to be undertaken at centers just before the exam
- 12) Details of real time monitoring facility to be provided to ICAI during the conduct of examination from each center.
- 13) Details and type of mock test – whether Server of Tenderer or ICAI
- 14) Identity Check process
- 15) Project Timeline to prepare for all processes from start to finish- ready for exam state
- 16) Kolkata office contact details – this is mandatory
- 17) Facilities for handicapped students provided by tenderer.
- 18) During conduct of Examination – which mode Centralized Server to all locations across India or Servers at each Exam center
- 19) Turnover last three years (only online exam division) (with supporting documents)
- 20) No of Employees (only online exam division)

**SECTION-4**

**Annexure - 2**

**FINANCIAL PROPOSAL - STANDARD FORM**

Financial Proposal Standard Form shall be used for the preparation of the Financial Proposal according to the instructions provided under Section 2.

FIN-1 Financial Proposal Submission Form

| Sl. No | Activity   | Quote – Online Test fees per candidate for each session [Centre Based] |    |
|--------|--|--|----|
|        |  | Particulars  | Rs |
| 1      | Conducting Computer Centre Based Exams in Multiple Sessions (2 Hours per exam session) | Test Fees  |    |
|        |  | Add: GST   |    |
|        |  | <b>Total</b>   |    |

**AND**

| Sl. No | Activity   | Rate per hour per candidate for the Online for each session [Home Based] |    |
|--------|--|--|----|
|        |  | Particulars  | Rs |
| 1      | Conducting Computer Based Exams from home location in Multiple Sessions [if required] (2 Hours per exam session) | Test Fees  |    |
|        |  | Add: GST   |    |
|        |  | <b>Total</b>   |    |

Yours sincerely,

|  |  |
|--|--|
| Authorized Signature<br>[In full and initials] |  |
|  |  |

|                             |  |
|-----------------------------|--|
| Name and Title of Signatory |  |
| Name of Firm                |  |
| Address                     |  |
| Mail Id                     |  |
| Phone No                    |  |
| Fax No (if any)             |  |

**Form FIN-1: FINANCIAL PROPOSAL SUBMISSION FORM**

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[Location, Date]

To: [Name and address of the INSTITUTE]

Dear Sir:

We, the undersigned, offer to conduct [Insert title of assignment] in accordance with your Request for Proposal dated [Insert Date] and our Technical Proposal. Our attached Financial Proposal is for the sum of [Insert amount(s) in words and figures]. This amount is inclusive of the applicable taxes,

Our Financial Proposal shall be binding upon us up to expiration of the validity period of the Proposal, i.e. before the date indicated in Point number 2.4 of the Data Sheet.

We understand you are not bound to accept any or all Proposal you receive.

We remain,

Yours sincerely,

|  |  |
|--|--|
| Authorized Signature<br>[In full and initials] |  |
| Name and Title of Signatory                    |  |

|                 |  |
|-----------------|--|
|                 |  |
| Name of Firm    |  |
| Address         |  |
| Mail Id         |  |
| Phone No        |  |
| Fax No (if any) |  |

## **SECTION-5**

### **TERMS OF REFERENCE FOR CONDUCTING COMPUTER-BASED EXAM FOR The Tax Research Department of THE INSTITUTE OF COST ACCOUNTANTS OF INDIA, ALL TAXATION COURSES DURING THE YEAR 2024 TO 2026**

#### **BACKGROUND**

##### **Overview**

The Institute of Cost Accountants of India (erstwhile The Institute of Cost and Works Accountants of India) was first established in 1944 as a registered company under the Companies Act with the objects of promoting, regulating and developing the profession of Cost Accountancy. The Institute of Cost Accountants of India is a premier, dynamic, vibrant professional institution actively associating itself in the industrial and economic development of the nation. The Institute of Cost Accountants of India set up by an Act of Parliament to develop and regulate the profession of Cost Accountancy in the country. The Institute of Cost Accountants of India, as a national accounting body, is founder member of International Federation of Accountants (IFAC), Confederation of Asian and Pacific Accountants (CAPA) and South Asian Federation of Accountants (SAFA). The Institute has entered into a Memorandum of Understanding (MOU) with The Chartered Institute of Management Accountants (CIMA), UK and The Institute of Management Accountants (IMA), USA to enable our members to acquire global Management Accounting qualification after exemptions as per MOU.

##### **Objective of the Assignment**

The Institute of Cost Accountants of India, herein after referred as "Institute" intends to conduct an online Computer Based Test (CBT) for all Taxation Courses during the year 2024 to 2027. The Institute for the above purpose intends to engage a Professional Agency to provide the following services:

- Establishing Test Centers in various locations with required IT Infrastructure & Manpower e.g.

computer hardware/software, Firewall, Anti-Virus Software for conduct of the online CBT (Cyber Café will not be accepted), Security Guards, Test Administrators, Chief Proctors, IT Support, Peons etc

- Provide Test Administration/Invigilation services at the Test Center venue
- To assist the Institute in question bank upload, management, training and provide mock drills prior to actual conduct of exam
- Evaluate the answer sheets submitted on line and provide section based results to the Institute after exam completion
- Provide audit trails of candidate keystrokes during exam session

Institute would provide confirmed city wise registration details to vendor with list of examination centers at least three weeks before the planned exam date. However, there may be some addition/deletions, which will be informed one week before the date of the examination.

### **Scope of work**

1. The Exam will have to conducted be in Test center consisting of a local server and workstations connected via local area network to a local server or through Remote Proctoring. Every Test Center locations must be equipped with suitable Hardware/software/Networking and other trained manpower to conduct the CBT on the given time and date. CBT is proposed to be conducted once per quarter between 10.00 am to 12.00 pm & 2.00 pm to 4.00 pm. Exact dates/time of the examination will be informed well in advance. However, the agency should be prepared to conduct the CBT at any point of time during the year on 45 days' notice. Though the Examination will normally be conducted thrice in a year, Institute reserves its right to conduct more number of examinations in a year and expects the selected Agency to conduct the same on 45 days' notice.
2. The Tenderer will also be responsible for providing the services with high element of integrity and confidentiality. The Institute has been maintaining a very high standard in the conduct of its Examination and the Tenderer is expected to provide its services without causing any damage to the reputation of the Institute.
3. Any other tasks related to the above.

### **Notes**

1. During opening of the financial bids, tenderer may like to be present.
2. The shortlisted technically qualified bidders may have to provide a demonstration in Kolkata as would be communicated by the Institute subsequently.
3. The Institute reserves the right to change any date/time mentioned in the schedule above.
4. A prospective tenderer requiring any clarification on the RFP documents may notify the Institute via e- mail on ID [trd.ad1@icmai.in](mailto:trd.ad1@icmai.in) and telephone number **033-4036-4717**.

### **Volume of work**

The Institute is expecting approx. 1500 candidates in a year (500 per term) to take the Exam for all Taxation Courses at an All India Level across approx. 20 cities. These numbers are based on our previous experiences, but may vary according to the quantum of admissions.

### **Phases**

The entire process shall be divided into the following phases: -

- (a) Pre-Examination Phase.
- (b) Examination Phase
- (c) Post Examination Phase

### **Scheme of Examination**

The exam shall be conducted as a Centre based Computer Based Examination (CBT) or through Remote Proctoring at home location of the candidate. It would be an MCQ Exam of 100 marks duration of exam being 2 hours. Case studies may form a part of the Question Paper where the answers would be in MCQs pertaining to the case study.

### **(The contents could be changed by the Institute)**

#### **(a) Pre-Examination Phase.**

- The software engine to be used for the online examination should be thoroughly tested and validated before going online and should facilitate the following:
- Question Bank upload and throwing the same to the local server on the day of exam.
- Designing the online examination plan and examination process under consultation with Examination Section, following will be the responsibility of the Tenderer:
  - 1) The Tenderer will provide a SPOC for the project who will be responsible to coordinate & manage the entire project with the Institute
  - 2) Tenderer should provide the addresses with land mark of the examination centers well before the examination date
  - 3) Selection of online Examination Test Centers / Venues. Tenderer will ensure that all Test Center Venues are identified and a list of the same needs to be submitted to the Institute 7 days before exam date including Name of the Institute, name of the test administrators, Seating Capacity, availability of Power Back-up etc.
  - 4) To ensure basic amenities like adequate cooling, suitable drinking water and separate toilet facilities, adequate firefighting measures etc.
  - 5) Each test center should provide for a minimum of 15% seating buffer for centers having expected students of more than 200 & a minimum of 10% seating buffer for centers having expected students of less than 200 for the examination slot/session. Arrangement should be in place for physically challenged candidates at ground floor or elevator facility to be extended.
  - 6) To ensure that Uninterrupted Power Supply (UPS) facility are available at each Test Centre and to ensure that Generator facility are available at each Test Centre
  - 7) Central Test Engine Software should be installed at a Tier III Data Center
  - 8) Ensure that till the end of exam after sanitization check the test Center will not to be used for any other activity/exam other than conducting the Institute examination
  - 9) Ensure availability of all exam PCs on network to be virus free
  - 10) Ensure availability of secure browser to be available on all exam PCs
  - 11) Ensure availability of test centers 1 day prior to the day of Examination. Ensure that the examination Computers are Sanitized to meet the Examination requirements. The tenderer should have both physical and logical control of all computers at third party centers, if any, till the end of examination
  - 12) Sanitization should be carried out for servers as well as all client machines where candidates will take the examination
  - 13) Ensure various levels of Checks, Tests & that Trial run are conducted to ensure site

readiness

- 14) Ensure that decentralized Servers are Setup at every Test Center venue
- 15) Ensure DR Servers configuration and testing for contingency
- 16) Tenderer must have the facility to allow candidates to appear for practice/Mock test through internet from anywhere in India to familiarize themselves to the Test Interface & processes.
- 17) Generate Admit cards (having Photograph and Sign of the candidates) and provide the dump to the Institute as well as circulate to the students (in their e-mails), with a confirmation to the Institute.
- 18) Conduct of Mock Tests, wherein the students may get accustomed to the platform of conduct of examination. The Mock Tests would also be in the same format as the main examination. The link to the answer clue would be provided at the end of the attempt of the Mock Test. Mock Tests may be attempted any number of times but should have a time restriction for completion of the attempt.

### **Technical /Test Engine Pre-requisites**

The essential Test Engine prerequisites are as follows: -

- 1) The Test Engine Exam Software must be owned by the Tenderer (copyright of the Software source code)
- 2) The Software must be tested for Performance, Security, Usability, High-Availability, Business Continuity, and Disaster-Recovery
- 3) The Test Engine Software should deliver the exams in a de-centralized CBT delivery model
- 4) Should have the capability to deliver exams through a secure browser
- 5) Test Engine Software should support different types of MCQ's
- 6) The Tenderer should have the required Software for the Institute SME's (Subject Matter Experts) to design, develop & Upload the Questions/Question Bank through authorization tool with drawing object including signs and symbols in a secure manner (Restricted IP, Encryption 128 bit SSL Based)
- 7) Tenderer should provide sufficient manpower to assist the Institute SMEs in uploading the Question bank on the Test Engine Server
- 8) Software should provide randomized test items & response
- 9) Software should provide summary of every question providing information on; i.e. Questions attempted, Questions yet to be attempted, Bookmarked Questions etc.
- 10) Software should provide Auto-Save functionality, review & Auto Submit if exam duration is over
- 11) Software should provide Candidate Photo and signature display on screen based on the data provided by the Institute.

### **(b) Examination Phase Manpower**

The tenderer should deploy the following manpower at the Test Centre venue: -

- (i) Exam Centre Administrator / Test Administrator
- (ii) IT Support Executive
- (iii) Invigilators (1:25)
- (iv) Support Staff/ Peons
- (v) Security Guards
- (vi) At least one lady staff in each test Centre where female candidate exists

**Note:** The above staff should be proportionate to the No of candidates per venue

- 1) To host the test and manage the test delivery process at the Test Centre. The computer systems and servers shall be of latest configuration and LAN must be scaled enough to handle the traffic in real time with proper backup and redundancy at each level.
- 2) The Tenderer is responsible for the following activities during the Exam day:
  - Server/Network Monitoring during conduct of examination
  - Assist in case of any IT failures at the Test Venue
  - Securing Server Data Pre/Post Examination
  - To prepare and provide documentary manuals for all processes for safe and secure conduct of examination to be followed along with rules for contingency and exception handling/emergency procedures.
- 3) The tenderer will be responsible to provision physical security, electrician at the Test Center venue & support staff
- 4) The tenderer should activate and maintain power backup in case of power failure especially during the conduct of examination.
- 5) Soft copies of encrypted Question Paper sets will be provided 24 Hour prior to the start of examination in prescribed format
- 6) To arrange frisking of candidates at examination Centre to disallow any electronic gadgets, pen, paper (other than admit card), bag etc. as per the guidelines of the Institute.
- 7) To complete the registration process of the candidates before start of examination and allow the eligible candidates to appear for test at the Test Centre, Physical verification of candidates' photo, signature in admit card with that of the data provided by the Institute and identity card should be done.
- 8) To arrange/provide required instructions/information to the candidates appearing for test at the Test Centers.
- 9) To maintain complete log of all activities of candidate during the course of examination to enable complete audit ability of the examination process.
- 10) To obtain feedback from candidates post examination via Online Feed Back Form
- 11) To devise system for monitoring and supervision of Test Centre activities (Centre level/ Candidate's level) at designated office via a dashboard.
- 12) To provide extra facilities for special / handicapped students with approval from ICAI.
- 13) To provide downloading facility of all the report through dashboard reporting features (Including attendance and how many delivered how many scheduled etc)

### **Emergency Handling**

In case of city based events beyond the control of the Institute or the tenderer, steps have to be taken by the tenderer for smooth conduct of examination with alternative arrangements.

In any particular Test Centre if any interruption/distribution/break-down happens during the examination, steps have to be taken by the tenderer for smooth conduct of examination with alternative arrangements including conducting the exam on a separate day with prior intimation.

### **(c) Post Examination Phase**

- 1) To provide the Institute with soft copy of marks obtained by each candidate and also the response given for each question in the desired/mutually agreed format, preferably in two different files.
- 2) Soft copy data of attendance with marks matching.
- 3) To provide marks data ready for result processing after all necessary validation and matching done.

- 4) To provide documented inputs and support for handling: -
  - Students queries
  - RTI queries
  - Court Cases
- 5) To make available all the required report & data in soft copy to the Tax Research Department of the Institute after the whole process has been completed.

### **Eligibility Criteria for the Tenderer**

The tenderer should meet the following basic eligibility criteria:-

- 1) Tenderer incorporated in India under Companies Act, 2013. Tenderer must be registered before 01/04/2015 must not be debarred from contracting with any legal entity in India, or blacklisted by any government entity/department.
- 2) The Tenderer's Annual Turnover for each year of the last 3 years should be above Rs. 50 Crores of which a minimum of 50% of the turn over should be from online examination business for each year of last 3 years (Group turnover will not be accepted) (Attach Audited Balance Sheet and P&L Statement).
- 3) Tenderer should have experience of conducting Online Examination since last 3 years of operation with experience of handling a minimum of 3,00,000 examinees per year at a Pan India level for each year in the last 3 years.
- 4) It is a mandatory requirement for the Tenderer to have its own office located in Kolkata at the time of participating in the tender.
- 5) The Online Exam Software must be *Intellectual Property Rights* (IPR) owned by the Tenderer (copyright of the Software source code) (Self-Certified letter).
- 6) Tenderer should have full-time Test Administrators in test centers as per the list provided by ICAI
- 7) The tenderer should have the capability to conduct online examinations for reputed Companies / Government organizations and the tenderer should provide a minimum of 3 client references where similar examination services have been provided clearly specifying the number of examinees (Attach Client Project Brief & Proof of Project Completion).
- 8) The Tenderer should have the following Certifications
  - (a) Information Security Standards ISO/IEC 27001:2005 Certified (Mandatory).
  - (b) ISO 9001:2008 Certified for service delivery of the examination process (Mandatory).
- 9) Should have experience of conducting examination process in the Education /Government sector to cover activities like computer based admit card upload, question paper rendering& computer based test delivery & administration and result processing.
- 10) Should preferably have experience in conducting online test for candidates appearing in Entrance Examinations where many candidates may not be familiar with computers.
- 11) Should not have been blacklisted by any Firm/Organization/School/Board/University/ Institution or any Government organization and no legal case pending in the court of law against the agency and an undertaking in this regard should be submitted along with the bid.
- 12) The agency whose contract has been terminated by the ICAI, is not eligible to apply again.

### **Terms and Conditions**

- 1) Cyber Cafes should not be used for conducting exams
- 2) Results should be declared to students on screen on submission of the answers by the tenderer
- 3) All data relevant to RTI Act, like candidate keystrokes during the exam should be handed over to the Institute.
- 4) The Institute will reject a proposal for award if it determines that the tenderer recommended for award has, directly or through an agent, engaged in corrupt, fraudulent, collusive or coercive practices in competing for the contract in question;

- 5) The Institute will cancel the portion of the order if it is determined at any stage and time that representative(s) of the Tenderer were engaged in corrupt, fraudulent, collusive or coercive practices during the selection process or the execution of the contract,

The Institute will sanction a Tenderer including declaring the Consultant ineligible, either indefinitely or for a stated period of time, to be awarded Institute's contract if at any time it is determined that the Tenderer has, directly or through an agent, engaged in corrupt, fraudulent, collusive or coercive practices in competing for or in executing, any contract.

**Convener**  
**LTE**