



ICMAI
THE INSTITUTE OF
COST ACCOUNTANTS OF INDIA
(Statutory Body under an Act of Parliament)



REQUEST FOR PROPOSAL (RFP)

Title of Services-
**CONDUCTING COMPUTER-BASED EXAM FOR
THE INSTITUTE OF COST ACCOUNTANTS OF INDIA
CERTIFICATE IN ACCOUNTING TECHNICIANS (CAT) COURSE
DURING THE YEAR 2023 TO 2026**

**THE INSTITUTE OF COST ACCOUNTANTS OF INDIA
(Statutory body under an Act of Parliament)
CMA Bhawan, 3, Institutional Area, Lodhi Road, New Delhi- 110003
Website: www.icmai.in**

SECTION-1

LETTER OF INVITATION

Subject: Request for Proposal (RFP) for selection of Agency for **CONDUCTING COMPUTER-BASED EXAM FOR THE INSTITUTE OF COST ACCOUNTANTS OF INDIA, CERTIFICATE IN ACCOUNTING TECHNICIANS (CAT) COURSE DURING THE YEAR 2023 TO 2026**

Dear Sir/Madam,

1. The Institute of Cost Accountants of India (herein after referred as "Institute") intends to conduct an online Computer Based Test (CBT) for its Certificate in Accounting Technicians (CAT) Course. The Institute for the above purpose intends to engage a Professional Agency to provide services as per Section 5 (terms of reference) under contract term for three years.
2. A firm will be selected on: Quality and Cost Based Selection (QCBS) basis and procedures described in this RFP.
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. **33,000/-** (Rupees Thirty Three Thousand only) in Demand Draft drawn in favour of "THE INSTITUTE OF COST ACCOUNTANTS OF INDIA", payable at New Delhi should be submitted along with the Proposal.
5. RFP Document can be downloaded from the website www.icmai.in
6. The Agency who is capable of executing the tasks indicated in the RFP may submit their proposals in the manner as prescribed in the RFP on or before **16:00 hrs of 11/12/2023** at the following address:

The Convener
Advertised Tender Enquiry
The Institute of Cost Accountants of India
CMA Bhawan, 3, Institutional Area,
Lodhi Road, New Delhi-110003

Local bidders may drop their envelopes (bids) in the Tender Box kept for the purpose on the ground floor of the mentioned address

7. The bid shall be submitted in two separate sealed envelopes, namely Technical bid (Annexure -1) and commercial bid (Annexure-2). Both of Technical and Commercial bids, duly stamped by the bidder, must be submitted at the same time, in separate sealed envelope along with the demand draft for E.M.D., *superscribed ATE/CBT-CAT/01/2023*.
8. 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 one year 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.
2. The Contract, if not extended, shall automatically expire after three 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 a 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 50,000 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 last date for submission of tender document **is on or before 16:00 hrs on 11th December 2023 at CMA Bhawan, 3, Institutional Area, Lodhi Road, New Delhi-110003**
13. The tender document to be dropped in the Tender Box available at the Ground floor, CMA Bhawan, 3, Institutional Area, Lodhi Road, New Delhi-110003
14. In case of any query related to the Tender Document, please contact **CMA R K Jain, 0120-2990008**.

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 annual Turnover for each year of the last 3 years should be above Rs. 50 Crores from CBT

Period of Contract:

1. The contract would be initially for one year and shall be extendable to further two years on satisfactory performance on same terms and conditions.
2. The Agency shall deploy its resources immediately after the contract is signed.

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 written 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 on the basis of service charges quoted by the Tenderer/Applicant.

2. In case, tie is observed in the price bid, the applicant with greater experience since commencement of the entity will be considered for the award of contract, if otherwise eligible.
3. Earnest Money amounting to Rs. 33,000/- (Rupees Thirty Three Thousand only) in form of Demand Draft drawn in favour of "THE INSTITUTE OF COST ACCOUNTANTS OF INDIA", payable at New Delhi should be submitted along with the proposal. The EMD amount of unsuccessful bidders will be returned within 30 days, without any interest.
4. The EMD of the successful bidder will be converted into security deposit and it would be part of the performance security of Rs.1,60,000/-, mentioned in point no. 5 in this section. The performance security would be retained by the Institute for a minimum period of 6 month (s) after expiry / termination of the contract. The Institute reserves the right to deduct appropriate amount from the security deposited in case of any dispute arising out of the contract.
5. Performance security in form of Bank guarantee to the extent of Rs. 1,60,000/- (Rupees One lakh Sixty thousand only) from any Commercial Bank, has to be provided by the successful tenderer to the Institute on signing of the contract. This Bank guarantee is revocable by the Institute in case of any dispute arising from major deviation from mutually agreed delivery parameters.
6. If at any point of time during the period of contact, 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 to impose penalty to the tune of 50% of the tender value 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 or differences whatsoever arising between the Parties, out of or in relation to the construction, meaning and operation or effect of the Agreement or breach thereof, shall be settled amicably. If, however, the Parties are not able to resolve such dispute or difference amicably, the same shall be referred for Arbitration to a sole Arbitrator to be mutually agreed upon. The Arbitration proceedings shall be governed by the provisions of the Arbitration and Conciliation Act 1996. The Arbitration proceedings will be carried out at Delhi and the award made in pursuance thereof shall be binding on the Parties.
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 Delhi.

Interested parties may send their offers/proposals along with the following documents mentioned in Annexure -1 and Annexure-2 to the address mentioned in section 1, point no. 6 on page no. 2.

Fully filled up offers/proposal may be sent through courier/speed post along with demand draft/s in favour of 'The Institute of Cost Accountants of India' payable at New Delhi as to reach on or before 16:00 hrs on 11/12/2023.

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)**

INFORMATION SHEET			
Sl.	Particulars	Information to be furnished by the applicant	For use By Institute
01	Name of the Tenderer/ Applicant Relation with Company		
02	Address of Head Office/ Regd. Office with telephone no. Fax no. E-Mail. etc.	Address : Tel No. with STD code: Fax no. with STD Code: E-mail address : Contact Persons with designation & Mobile Number (i) (ii)	
3	Address of the other offices/ branches with Telephone no. fax no. E-Mail address etc.	Address : Tel No. with STD code: Fax no. with STD Code: E-mail address : Contact Persons with designation: (i) (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		

QUALIFYING CRITERIA					
Sl.	Qualifying Criteria				For use by Institute
12.	Services rendered and number of examinees attended the examination				
			Turnover	Turnover from online examination	
13.	Turnover in last three financial year(FY) i.e. 2022-23, 2021-22, 2020-21 as per audited Profit & Loss Account	FY 2022-23 :			
		FY 2021-22 :			
		FY 2020-21:			
14.	Empanelled as Service Provider with at least three (CPSEs) or State (PSEs) or autonomous body or Central Govt. / Depts or State Govt. Depts. and three leading Private Sectors. (with documentary evidence)	(i) CPSEs/State PSEs/Central Govt./Depts autonomous body / State Govt. Depts.: (a) (b) (c) (ii) Private Sectors: (a) (b) (c)			

15.	Full- fledged office and infrastructure at Delhi NCR equipped with all modern facilities viz. telephone, fax, computer, e-mail address, internet etc.		
16.	Whether agreeable to at least 45 days credit payment		
17.	Separate self- declaration as to the authenticity of the information/documents		

MANDATORY DOCUMENTS TO BE SUBMITTED ALONG WITH ANNEXURE – 1

- a) Last three years Audited Profit & Loss A/c and Balance Sheet
- b) Last three years Income tax return
- c) Last three years Service tax/GST return.

Date _____

Place _____

Signature /Authorized Signatory

Note:

- 1) 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.
- 2) The institute reserves the right to reject any incomplete application without showing any reason.
- 3) 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.

SECTION-2: INSTRUCTIONS TO AGENCY
Data Sheet

Sl. No	DETAILS
2.1	Name of the Client: THE INSTITUTE OF COST ACCOUNTANTS OF INDIA (hereinafter called INSTITUTE) Method of selection: Quality and Cost Based Selection (QCBS)
2.2	All the three Parts should be submitted in three separate Sealed Envelopes- (i) Earnest Money Deposit (to be submitted in the envelop of Technical proposal) (ii) Financial Proposal (iii) Technical Proposal Name of the assignment is: Selection of Agency for CONDUCTING COMPUTER-BASED EXAM FOR THE INSTITUTE OF COST ACCOUNTANTS OF INDIA, CERTIFICATE IN ACCOUNTING TECHNICIANS (CAT) COURSE DURING THE YEAR 2023 TO 2026.
2.3	The INSTITUTE will provide the following inputs and facilities: The INSTITUTE will share only the documents available with it regarding the assignment. No other support or facilities will be provided by the INSTITUTE.
2.4	Proposals must remain valid for 90 days after the closing date of Tender documents.
2.5	The format of the Technical Proposal to be submitted is: FTP
2.6	Amounts payable by the INSTITUTE to the Agency under the contract to be subject to Indian taxation: Yes
2.7	The Proposal submission address is: The Convener Advertised Tender Enquiry The Institute of Cost Accountants of India CMA Bhawan, 3, Institutional Area Lodhi Road, New Delhi-110003
2.8	Proposals must be submitted not later than the following date and time: 16:00 hrs on 11/12/2023

<p>2.9</p>	<p>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 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. The Technical Proposals, which includes presentation, will carry weightage of 70% and be evaluated by a Committee constituted by Authority, on the basis of the criteria specified in Annexure A.</p> <p>c. Only Agencies scoring 70% marks or more in the Technical Evaluation will be shortlisted for opening and consideration of their financial bids.</p> <p>d. Financial Bids of the shortlisted applicants may be opened in the presence of the authorized representatives of the Agency on a date / time to be specified by the Authority. Financial evaluation, based on the total fee quoted by the applicant for the contract, will carry a weightage of 30%.</p> <p>Financial Evaluation would be made on lowest (L1) basis on the basis of service charges quoted by the Tenderer /Applicant.</p>
<p>2.11</p>	<p>Evaluation Criteria and Identification of Best Evaluated Bid</p> <p>Evaluation Criteria proposed to be adopted will be Quality and Cost Based Selection (QCBS) where Technical Bid Score will get a weightage of 70% and Commercial/ financial Bid Score a weightage of 30%.</p> <p>Description of variables used:</p> <ul style="list-style-type: none"> • T is the technical score for each bid • ST is the Total Technical Score for each Bid • $ST = 0.7 \times T$ • F is the Commercial Bid Price quoted in the Bid under consideration • FL is the value of lowest Qualifying Commercial Bid Price • Commercial Bid Score (SF) for each Bid shall be computed as follows: $SF = 100 \times (FL / F)$ • Total Score (TS) for each Bid shall be computed as follows: $TS = (ST) + (0.3 \times SF)$ <p>The Bid, that obtains the highest Total Score (TS) value, will be rated as the Best Evaluated Bid.</p> <p>The Bid that obtains 70% or more marks in Technical Evaluation and scored L1 in Financial Evaluation will be rated as the Best Evaluated Bid.</p>

SECTION-3

Technical Proposal - Standard Forms

- TECH-1 Technical Proposal Submission Form
- TECH-2 Submission of Required Documents in Support of Eligibility
- TECH-3 Comments or Suggestions on the Terms of Reference and on Counterpart Staff and Facilities to be provided by the INSTITUTE --- On the Terms of Reference

Form TECH-1 Technical Proposal Submission Form

[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 2.8 of the Data-Sheet.

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

We remain,

Yours sincerely,

Authorized Signature [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) Demand Draft No.: Date: Bank Name: Amount: Rs.33,000/- In favor of: THEINSTITUTE OF COSTACCOUNTANTS OF INDIA Payable at: New Delhi	YES	NO		
2.	Documentary evidence in support of being a Company registered before 01 / 04 / 2018 under Companies Act, 2013	YES	NO		
3.	Documentary evidence in support of having Annual Turnover of Rs 50 Crores or above for each year of the last 3 years from CBT (Group turnover will not be accepted). (Attach Audited Balance Sheet, P&L Statement and turnover from CBT.	YES	NO		

Sl. No.	Documents Need to be Submitted	Whether Submitted (Tick YES/NO)		Relevant Details	Remarks
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 2,00,000 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 Delhi/NCR at the time of participating in the tender	YES	NO		
6.	Documentary evidence in support of having Online Exam Software with <i>Intellectual Property Rights</i> (IPR) owned by the Tenderer (copyright of the Software source code) (Self-Certified letter).	YES	NO		
7.	Documentary evidence in support of having certified Test Administrators in the test centers as per the list provided by this Institute	YES	NO		
8.	Documentary evidence in support of having Test Center Infrastructure across 100 Indian Cities.	YES	NO		
9.	PAN Card-Details should be submitted with proper attestation	YES	NO		

10	GST Registration Number-Details should be submitted with proper attestation	YES	NO		
11	Documentary evidence in support of having quality certification such as ISO 9001 or equivalent	YES	NO		
12	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 [*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) Staff Details at centers – TA, Supervisors, security, support staff
- 11) Ratio of staff to seat capacity
- 12) Data handover process
- 13) Sanitization measures to be undertaken at centers just before the exam
- 14) Details of real time monitoring facility to be provided to ICMAI during the conduct of examination from each center.
- 15) Details and type of mock test – whether Server of Tenderer or ICMAI
- 16) Identity Check process
- 17) Project Timeline to prepare for all processes from start to finish- ready for exam state
- 18) Delhi office contact details – this is mandatory
- 19) Facilities for handicapped students provided by tenderer.
- 20) Maximum number of concurrent students who have taken online exam
- 21) During conduct of Examination – which mode Centralized Server to all locations across India or Servers at each Exam center
- 22) Turnover last three years (only online exam division) (with supporting documents)
- 23) No of Employees (only online exam division)

Form TECH-3 Comments and Suggestions on the Terms of Reference and on Counterpart Staff and Facilities to be provided by the INSTITUTE

On the Terms of Reference

[Present and justify here any modifications or improvement to the Terms of Reference you are proposing to improve performance in carrying out the assignment (such as deleting some activity you consider unnecessary, or adding another, or proposing a different phasing of the activities). Such suggestions should be concise and to the point, and incorporated in your Proposal.]

SECTION-4

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

S.No	Activities (Based on tasks to be carried out as per Section-5 Terms of Reference)	Quote – Fee Per Candidate
1	Conducting Computer Based Exams in Two Sessions (2 Hours each)	Online test fee of Rs ----- /- (plus GST) per candidate for both the sessions. Test Fees Rs. _____ + GST Rs. _____ Total= Rs. _____ /-

Yours sincerely,

Authorized Signature [*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

[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 figures¹]. This amount is inclusive of the applicable taxes,

Our Financial Proposal shall be binding upon us subject to the modifications resulting from Contract negotiations, up to expiration of the validity period of the Proposal, i.e. before the date indicated in Point number 2.8 of the Data Sheet.

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

We remain,

Yours sincerely,

Authorized Signature [In full and initials]: _____

Name and Title of Signatory: _____

Name of Firm: _____

Address: _____

SECTION-5

TERMS OF REFERENCE

FOR CONDUCTING COMPUTER-BASED EXAM FOR THE INSTITUTE OF COST ACCOUNTANTS OF INDIA CERTIFICATE IN ACCOUNTING TECHNICIANS (CAT) COURSE DURING THE YEAR 2023 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.

On 28th May, 1959, the Institute was established by a special act of Parliament, namely, the Cost and Works Accountants Act, 1959 as a statutory professional body for the regulation of the profession of cost and management accountancy.

It has since been continuously contributing to the growth of the industrial and economic climate of the country.

The Institute of Cost Accountants of India is the only recognised statutory professional organisation and licensing body in India specialising exclusively in Cost and Management Accountancy.

A Cost Accountant is a person who offers to perform or perform services involving the costing or pricing of goods and services or the preparation, verification or certification of cost accounting and related statements.

The head office is situated at 12, Sudder Street, Kolkata 700 016 and operates through four regional councils are Kolkata, Chennai, Delhi and Mumbai as well as through a number of important chapters situated elsewhere in India and abroad.

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 its Certificate in Accounting Technicians (CAT) Course during the year 2023 to 2026. 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 week before the planned exam date. The list of Test Centers as per **Annexure B** is tentative and may

increase or decrease depending upon the requirements. However there may be some addition/deletions, which will be informed one month 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. 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 in the month of June/ July and Dec/ January 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 30 days' notice. Though the Examination will normally be conducted twice 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 30 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.

Schedule

The broad time schedule is given below:-

Sl. No	Activity	Date & Time	Remarks
1.	Invitation for Tender Document	20/11/2023	
2.	Last date for submission of Bids	11/12/2023	By 16:00 hrs
3.	Shortlisted Technically qualified bidders may be called for further demonstration	Shortlisted bidder will be communicated accordingly	

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 or in Delhi 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 cat.hod@icmai.in and telephone number **0120- 2990008**

Volume of work

The Institute is expecting approx. 4000 candidates in a year (2000per term) to take the CAT Course Exam at an All India Level across approx. 50 cities. Tentative Center list is given in **Annexure B**.

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 Computer Based Examination (CBT) as per following format:-

PAPER	SECTION	Contents	Duration of exam	Marks	Type of Questions
1	A	Fundamentals of Financial Accounting	2 Hrs.	60	MCQ
	B	Applied Business and Industrial Laws		40	MCQ
2 Hour Break between Paper 1 and Paper 2					
2	A	Financial Accounting-2	2 Hrs.	50	MCQ
	B	Statutory Compliance		50	MCQ

(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 preferably mapped as closely as possible with the ICMAI exam center list 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 25 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.
- 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) Conduct Trial runs across all Test Center venues to ensure that all Exam parameters match the requirement (1-2 days Prior to Exam date)
- 16) Ensure DR Servers configuration and testing for contingency
- 17) Provide a detailed Site Readiness Check list Report to the Institute before the actual Examination date
- 18) 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.

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:-

- (a) Exam Centre Administrator / Test Administrator
- (b) IT Support Executive
- (c) Invigilators (1:25)
- (d) Support Staff/ Peons

- (e) Security Guards
- (f) At least one lady staff in each test Centre

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 ICMAI.

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 in the desired/mutually agreed format.
- 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:-
 - o Students queries
 - o RTI queries
 - o Court Cases
- 5) To make available all the required report & data in soft copy to the Institutes Examination section 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 01/04/2018 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 from CBT(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 2,00,000 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 Delhi NCR 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 ICMAI
- 7) The tenderer should have the capability to conduct examination for a minimum of 200 days across 100+ cities in India preferably with a multiple test centers spread across in each cities so that candidates' should be able to take exams at a time and location of their choice. 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-Certified (Mandatory).
 - (b) ISO 9001- Certified for service delivery of the examination process (Mandatory).
- 9) Should have experience of conducting end-to-end examination process in the Education /Government sector to cover activities like computer based application processing, payment, gateway, admit card upload, question paper setting & 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 ICMAI, is not eligible to apply again.

Important Points for Selection

- 1) Matching centers with the Institute list of centers
- 2) Security measures at exam centers – both physical verification and technical
- 3) Data Security Measures
- 4) Technical Infrastructure of Tenderer
- 5) Membership of Professional Bodies
- 6) Experience with Government Bodies and Educational Institutes
- 7) Audit Trail of candidate keystrokes during exam
- 8) Presentation of the Tenderer
- 9) Past feedback regarding performance in conducting online examinations
- 10) User authorization and authentication:
 - a. The system should support a very strong authorization and authentication for staff and test takers
 - b. The system should make sure that correct test taker is part of the assessment
- 11) Site Visit by Institute's team
- 12) Max no of candidates for whom online test conducted concurrently
- 13) Past experience with Govt./Educational organization
- 14) Seating capacity at each center
- 15) Sanitization processes of computers at every center is an important point and will be considered

Instructions to Tenderers

The Tenderers are invited to submit a Technical Proposal and a Financial Proposal, as specified below for consulting services required for the assignment named in the Data Sheet. The tenderers are required to deposit Earnest Money Deposit of Rs.33,000/- in the form of Demand Draft drawn in favor of '**The Institute of Cost Accountants of India**' payable at New Delhi and the same is to be enclosed with the Technical Proposal. The Technical and Financial proposal will be rejected if the EMD of Rs.33,000/ is not attached. The Earnest Money will be adjusted for the performance security for the successful tenderer, and will be refunded to other unsuccessful tenderers, without any interest. The Proposal will be the basis for a signed Contract with the selected Tenderer.

All costs for bidding will be borne by tenderers.

At any time before the submission of Proposals, the Institute may amend the RFP by issuing an addendum in writing or by standard electronic means. The addendum shall be sent to all Tenderers and will be binding on them. Tenderers shall acknowledge receipt of all amendments. To give Tenderers reasonable time in which to take an amendment into account in their Proposals the Institute may, if the amendment is substantial, extend the deadline for the submission of Proposals.

In preparing their Proposal, Tenderers are expected to examine in detail the documents comprising the RFP.

Material deficiencies in providing the information requested may result in rejection of a Proposal.

Tenderers are required to submit separate Technical Bid and Financial Bid separately in the formats given.

The Technical Proposal shall not include any financial information. A Technical Proposal containing financial information will be declared invalid.

Tender Submission

Both the Technical and Financial Bids should be in separate sealed envelopes and the Demand draft of Rs 33,000/- should be enclosed inside the envelope of the Technical bid.

Both the envelopes containing the Technical and Financial Bids should be then enclosed in a larger envelope which should be marked to the following:

The Convener

Advertised Tender Enquiry

The Institute of Cost Accountants of India

CMA Bhawan, 3, Institutional Area

Lodhi Road, New Delhi – 110003

Sealed Tender should be submitted in to the tender box at the above address.

Closing Date for Submission of Tender: 11/12/2023 by 16:00 hrs

Terms and Conditions

- 1) Cyber Cafes should not be used for conducting exams.
- 2) Results should not be declared to students 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,
- 6) 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

ANNEXURE-A

SELECTION CRITERIA (POINT ALLOCATION) WILL BE AS FOLLOWS:

S.No	Eligibility Criteria	Maximum Marks	Parameters	
1	Having experience of conducting end-to-end examination process in the Education /Government sector	20	Having	20
			Not having	0
2	Experience of conducting Online Examination since last 3 years of operation with experience of handling a minimum of 2,00,000 examinees per year at a Pan India level for each year in the last 3 years.	20	For 2,00,000 Candidates	7
			2,00,001 to 3,00,000	15
			Above 3,00,000	20
3	Having Test Center (owned) Infrastructure across 100 Indian Cities.	20	For 100 Cities	10
			For 101 to 150	15
			above 150	20
4	Annual Turnover for each year of the last 3 years should be above Rs. 50 Crores from CBT	20	For 50 Crores	10
			Above 50 Crores to 100 Crores	15
			Above 100 Crores	20
5	Provide a minimum of 3 client references where similar examination services have been provided and also the number of examinees appeared in the examination	10	For 3 clients	5
			For 6 to 10 Clients	7
			For 11 and more	10
6	Having quality certification such as ISO 9001 or equivalent	5	Having ISO or equivalent quality certification	5
			No quality certification	0
7	Security measures/ infrastructure for conducting on- line test.	5	If having	5
			If not having	0
Total		100		

Tentative Center List

- 1) Bhopal
- 2) Bilaspur
- 3) Raipur
- 4) Surat
- 5) Indore
- 6) Alleppey
- 7) Chennai
- 8) Cochin
- 9) Coimbatore
- 10) Erode
- 11) Hyderabad
- 12) Idukki
- 13) Kannur
- 14) Kasaragod
- 15) Kollam
- 16) Kottayam
- 17) Kozhikode
- 18) Madurai
- 19) Mallapuram
- 20) Nellore
- 21) Palakkad
- 22) Pathanamthitta
- 23) Pudukkottai (TN)
- 24) Rajahmundry
- 25) Thrissur
- 26) Tirunelveli
- 27) Trivandrum
- 28) Vellore
- 29) Vijayawada
- 30) Visakhapatnam
- 31) Wayanad
- 32) Panjim
- 33) Durgapur
- 34) Kolkata
- 35) Patna
- 36) Chandigarh
- 37) Gandhinagar
- 38) Pune
- 39) Dehradun
- 40) Delhi
- 41) Lucknow
- 42) Nashik
- 43) Jaipur
- 44) Kanpur
- 45) Bhubaneswar
- 46) Ranchi
- 47) Udaipur
- 48) Jammu
- 49) Mumbai
- 50) Bengaluru

‘Please note that this list is not exhaustive and can be modified according to the demand.’