



Request for Proposal (RFP)
For
National Concurrent Evaluation of Skill and
Livelihood Support Initiatives – 2025
(Document Reference Number: IIM Mumbai/2025-
26/RFP/02)

1. INTRODUCTION

The Indian Institute of Management Mumbai (IIM Mumbai), formerly known as the National Institute of Industrial Engineering (NITIE), is an Institution of National Importance under the Ministry of Education, Government of India. Established in 1963, the Institute has been a premier centre of excellence in the areas of industrial engineering, operations management, logistics, and supply chain management. Over the years, IIM Mumbai has evolved into a multidisciplinary management institute, contributing significantly to national capacity building, policy formulation, and applied research across diverse sectors.

IIM Mumbai undertakes research and consultancy assignments of national importance, offering evidence-based insights for ministries, government departments, public-sector enterprises, multilateral agencies, and corporates. The Institute has a distinguished record of implementing large-scale evaluation and capacity-building projects in collaboration with organizations such as the World Bank, NITI Aayog, Ministry of Education, Ministry of MSME, Comptroller and Auditor General of India (CAG), and various State Governments. These engagements reflect IIM Mumbai's commitment to advancing data-driven governance, sustainability, and inclusive development through rigorous scientific and analytical frameworks.

The Institute operates through dedicated centres of excellence and interdisciplinary research groups focusing on domains such as logistics and supply chain optimization, sustainable manufacturing, public procurement and contract management, energy and waste management, entrepreneurship and innovation, and digital public infrastructure. Leveraging its faculty expertise, advanced laboratories, and national research collaborations, IIM Mumbai ensures the highest quality in policy research, project evaluation, and data-driven impact assessment.

IIM Mumbai expressly stipulates that selection of a Bidder under this document is on the understanding that this document contains only the principal provisions for the entire assignment, and that any other services which may be required in connection with the successful implementation of the assignment and falling within the scope of the principal provisions shall be deemed to be a part of the assignment. The selected Bidder shall be required to perform all such tasks and render all requisite services as may be necessary for the successful completion of the entire assignment at no additional cost to IIM Mumbai.

To that end, as per the scope of work, Bidders are requested to submit their proposals strictly conforming to the terms and conditions mentioned in this document.

2. DATE, TIME AND ADDRESS FOR SUBMISSION OF BIDS

Sr. No.	Event	Date & Time
1	Date of issuance of RFP	7th November 2025
2	Pre-Bid Meeting	11th November 2025 at 11:00 hrs (Hybrid Mode). The meeting shall be conducted in hybrid mode. Bidders who wish to attend in person shall be present at the Conference Room, IIM Mumbai, Vihar Lake Road, Powai, Mumbai

		– 400 087. Bidders preferring to attend virtually will receive the meeting link via email after prior registration.
3	Last Date for seeking clarifications (via email only)	13th November 2025 by 17:00 hrs. All queries shall be submitted only through email in clearly mentioning the subject line “Query – RFP for Concurrent Evaluation of PM Vishwakarma Scheme 2025”.
4	Last Date for submission of bids	15th November 2025 by 16:00 hrs. Bids received after this time shall not be considered.
5	Date and Time of Opening of Bid (Eligibility Criteria & EMD)	15th November 2025 at 16:30 hrs. The opening shall be conducted in hybrid mode at the IIM Mumbai campus. The meeting link shall be shared by email to all bidders whose bids are received within the deadline.
6	Evaluation of Technical Bids and Presentations by Shortlisted Bidders	17 th November 2025. Shortlisted bidders shall be informed of the specific schedule and presentation format through email after evaluation of eligibility documents.
7	Date of Opening of Price Bids and Award of Work Order	18th November 2025 at 17:30 hrs. The Letter of Award / Work Order shall be issued to the selected bidder within 24 hours of approval.
8	Project Commencement Date	21st November 2025 (the date of issuance of Work Order shall be treated as the Effective Date of commencement).
9	Project Completion Date	16th January 2026 (Eight weeks from the date of commencement).

3. INSTRUCTIONS FOR SUBMISSION OF BIDS

The proposals must be prepared enclosing all the required documents and submitted to Indian Institute of Management (IIM) Mumbai at the portal, on or before the closing date specified in the RFP.

Please refer to the checklist to ensure that the submission includes all required documents.

3.1 Format and Submission

The proposal shall be submitted in four separate formats, strictly following the instructions below:

Format 1 – Minimum Eligibility Documents

This Format shall contain all documents to ascertain the bidder’s minimum eligibility criteria.

Super scribe the Format as:

“Documents to Ascertain Minimum Eligibility Criteria (Reference No: IIMM/2025/RFP/01)”

Format II – EMD / MSME Certificate

This Format shall contain the Earnest Money Deposit (EMD) or a valid MSE/UDYAM Registration Certificate.

Super scribe the Format as:

“EMD Project (Reference No: IIMM/2025/RFP/01)”

Format III – Technical Bid

This Format shall contain all technical bid documents as per the requirements outlined in this RFP.

Super scribe the Format as:

“Technical Bid Project (Reference No: IIMM/2025/RFP/01)”

Format IV – Financial/Price Bid

This Format shall contain the financial proposal strictly as per the format provided in Annexure XI.

Super scribe the format as:

“Price Bid for Project (Reference No: IIMM/2025/RFP/01)”

Note: Any erroneous or incomplete data in the Price Bid shall automatically lead to bid rejection.

Main Format

All four Formats must be uploaded within a single main format(Folder), superscribed as:

“Bid for Concurrent Evaluation of PM Vishwakarma Scheme (Reference No: IIMM/2025/RFP/01)”

3.2 Submission Mode and Address

All four formats shall be uploaded on the portal on or before the deadline mentioned in Section 2:

3.3 General Instructions

- i. Bidders shall submit only one response to this RFP. In case of partnerships/consortiums, submission shall be made through the lead organization only.
- ii. The proposal shall be submitted in hard copy only; submissions through any other mode such as fax or email will not be accepted.
- iii. All expenses incurred towards preparation, printing, and delivery of the proposal shall be borne entirely by the bidder.
- iv. IIM Mumbai reserves the right to increase, decrease, or modify the scope of work or cancel the RFP at any stage without assigning any reason.
- v. IIM Mumbai reserves the right to accept or reject any bid and to annul the bidding process without incurring any liability to any bidder.
- vi. Bidders who are not selected will be informed after completion of the tendering process.
- vii. The bid documents submitted must have a validity of 120 days from the last date of submission.
- viii. No fee is payable for obtaining this RFP document.
- ix. Stamp duty and registration charges, if any, incurred towards the execution of the agreement shall be borne by the selected bidder.
- x. The tenure of the agreement for the project shall be for a period not exceeding 12 weeks, commencing from the date of issuance of the work order.
- xi. Submission of the bid implies acceptance of all terms and conditions stated in this RFP.
- xii. The proposal shall be prepared in indelible ink with no overwriting or erasures.
- xiii. Bidders must examine all instructions, forms, and specifications carefully. Failure to furnish all information may result in rejection.
- xiv. All formats must be complete and uploaded in the portal as per Section 3.1. IIM Mumbai shall not be responsible for any non-submission of document and /or submission of incomplete/incorrect information.
- xv. Each page of the proposal and annexures must be signed and stamped by the authorized signatory of the bidder before uploading.
- xvi. The bids shall be opened in the presence of authorized representatives of the bidders who wish to attend.
- xvii. This RFP does not confer any right or claim for award of work unless an agreement is formally executed between IIM Mumbai and the selected bidder.
- xviii. IIM Mumbai reserves the right to engage alternate agencies if the selected bidder fails to perform as per terms of the contract.

xix. The Letter of Acceptance must be acknowledged by the selected bidder within two (2) working days from the issuance of the work order, clearly indicating the date of commencement of work.

3.4 CHECKLIST OF DOCUMENTS

Interested Bidders shall submit the following documents in Format I, II, III, and IV as part of their proposal.

All documents must be duly signed and stamped by the Authorized Signatory of the firm. Bidders are advised to ensure that their submission is complete in all respects and in the sequence indicated below.

Format I: Documents to Ascertain Minimum Eligibility Criteria

Sr. No.	Item / Document
1	Original Solvency Certificate from the bank for an amount of not less than INR 40,00,00/- (Rupees Forty Lakhs only). Failure to furnish a valid solvency certificate shall lead to automatic disqualification of the bidder.
2	Covering Letter as per the format given in Annexure I.
3	Details of the Company / Agency as per the format given in Annexure II.
4	A Cancelled Cheque of the bank account mentioned in Annexure II.
5	No Conviction / No Blacklisting Declaration as per the format in Annexure VI.
6	Confirmation of Project Completion for similar assignments in the last three years, as per the format in Annexure VII.
7	Letter of Authorization authorizing a person with full powers to sign, submit, and represent the proposal in response to this RFP, as per Annexure III.
8	Details of Similar Works Executed as per Annexure VIII, along with copies of Purchase Orders / Work Orders for projects of similar scale and nature.
9	Audited Profit and Loss Statements and Balance Sheets / CA Certificate for FY, 2022–23, 2023–24 and 2024–25
10	RFP document, signed and stamped on each page by the Authorized Signatory.
11	Copy of Certificate of Incorporation / Registration / Memorandum of Association as applicable.
12	Copy of PAN Card.
13	Copy of GST Registration Certificate.
14	Undertaking on Company Letterhead confirming that the bidder has read and agrees to all the terms and conditions of this RFP.

Format II: EMD

Sr. No.	Item / Document
1	Earnest Money Deposit (EMD) of INR 1,00,000/- (Rupees One Lakh only) drawn in favor of “Indian Institute of Management Mumbai” payable at Mumbai OR valid MSE / UDYAM Registration Certificate (in lieu of EMD) in accordance with Section 5.2 of this RFP.

Format III: Technical Bid

Sr. No.	Item / Document
1	Confirmation of Scope of Work as per the format given in Annexure IX, duly signed by the Authorized Signatory.
2	CVs of Key Resources and Field Supervisors proposed for the assignment, as per the format (Annexure IV).
3	Company Capability Statement highlighting relevant expertise, experience in large-scale field surveys, data analytics, and concurrent evaluations, as per Annexure V.
4	Client References from similar national or state-level assignments, as per the format in Annexure X.
5	Resource Deployment and Implementation Plan indicating the number of field investigators, supervisors, data analysts, and quality assurance personnel to be deployed across states/UTs, as per Annexure XVII.
6	Detailed Work Plan and Methodology for executing the survey (including tools, sampling, and digital data collection mechanisms).
7	Organization Chart and Responsibility Matrix for field execution and coordination.

Format IV: Price Bid

Sr. No.	Item / Document
1	Price Bid as per the format given in Annexure XI, containing all cost components (inclusive of taxes, travel, and administrative overheads) in Indian Rupees (INR) only. The Price Bid shall be free from any conditional statements.

General Notes:

- Bidders must ensure that none of the price details appear in other Format other than price bid. Any such occurrence shall lead to automatic disqualification.
- All Format must be clearly superscribed with the respective titles and reference number of this RFP.
- The documents must be submitted in the order listed above.
- IIM Mumbai reserves the right to request clarification or additional documents during the evaluation process.
- Incomplete or non-compliant submissions shall be liable for rejection.

4. MINIMUM ELIGIBILITY CRITERIA

The proposals received from interested bidders in response to this RFP shall be evaluated based on the following Minimum Eligibility Criteria.

Only those agencies that satisfy all the criteria specified below and submit the necessary supporting documents shall be considered eligible for further technical evaluation.

Bidders are advised to read the requirements carefully and ensure that they provide the required information in a clear and verifiable manner.

Sr. No.	Eligibility Criteria	Supporting Document(s) to be Submitted
1	Legal Status and Registration: The bidder must be a legally registered entity in India under the Companies Act, 1956/2013, Society Registration Act, 1860, Indian Trust Act, 1882, or any other relevant statutory act. Consortiums are permitted only if one partner is designated as the Lead Agency.	Copy of Certificate of Incorporation / Registration / Trust Deed / Society Registration Certificate. In case of consortium, attach the MoU or Consortium Agreement with defined roles of each partner.
2	Experience in Similar Assignments: The bidder must have successfully completed at least three (3) similar assignments during the last five (5) financial years (FY 2019–20 to FY 2023–24) involving large-scale field surveys / social audits / concurrent evaluations / impact assessments for Government Ministries, Departments, PSUs, or Multilateral Agencies. At least one project should have covered a sample size of 5,000 or more respondents across multiple states.	Copy of Work Orders / Completion Certificates / Client Letters issued by Government Departments or PSUs. Each document must clearly mention the assignment title, client name, duration, contract value, and scope.
3	Financial Strength: The bidder must have a minimum average annual turnover of INR 2.5 Crores during the last three financial years (FY 2022–23, FY 2023–24, FY 2024–25).	Audited Balance Sheet and Profit & Loss Statements for the past three years, OR a certificate from a Chartered Accountant specifying the turnover for these years.
4	Net Worth: The bidder should have a positive net worth in each of the last three financial years.	Certificate from a Chartered Accountant confirming positive net worth for FY 2022–23, FY 2023–24, FY 2024–25.
5	Solvency: The bidder must submit an original solvency certificate from a nationalized or scheduled commercial bank for an amount of at least INR 2 Crores, issued not earlier than 1 st June 2025.	Original Solvency Certificate from the bank on official letterhead, signed by an authorized bank officer.
6	Manpower and Infrastructure Capability: The bidder must have an established organizational setup with at least 50 full-time or contractual field investigators / enumerators and 5 supervisory staff /	Declaration on company letterhead with organizational structure and staff strength, supported by employee details and payroll summary / contracts or EPF/ESIC Challan etc.

	project coordinators, experienced in primary data collection using digital tools, or tablet-based surveys.	
7	Project Management Capability: The bidder should have in-house expertise in survey design, data analytics, statistical processing, and report preparation. The bidder must possess or have access to analytical tools/software such as SPSS, STATA, R, or equivalent.	Organization Capability Statement as per Annexure V; details of tools/software and team expertise to be provided.
8	Presence and Reach: The bidder must demonstrate survey and coordination capability in at least 10 States/UTs through its own staff, regional offices, or partner agencies (in case of consortiums).	Documentary evidence such as regional office address proof, MoUs with local agencies, or prior project details covering multiple states.
9	Past Performance and Credibility: The bidder should not have been blacklisted, debarred, or declared ineligible by any Central/State Government Department, PSU, or Multilateral Institution as of the date of submission of the proposal.	Self-declaration on letterhead as per Annexure VI (No Conviction / No Blacklisting Declaration).
10	Tax Compliance: The bidder must possess valid PAN and GST Registration numbers and must have filed Income Tax and GST returns for the last three financial years.	Copy of PAN Card, GST Registration Certificate, and proof of return filings (acknowledgement slips).
11	Earnest Money Deposit (EMD): The bidder shall submit an EMD of INR 2,00,000/- (Rupees One Lakh only) in favor of “Indian Institute of Management Mumbai,” payable at Mumbai. MSME / UDYAM registered entities are exempted from EMD on submission of valid certificate.	Demand Draft / Bank Guarantee / MSME Certificate in accordance with Section 5.2.
12	Bid Validity: The bid submitted shall remain valid for a minimum period of 120 days from the last date of submission.	Declaration of Acceptance of Terms on company letterhead.
13	Undertaking on Acceptance of RFP Terms: The bidder must provide an undertaking that it has read and understood all clauses of this RFP and agrees to abide by the same.	Signed and stamped undertaking on company letterhead.

Additional Notes:

1. Failure to comply with any of the above eligibility conditions shall lead to immediate rejection of the proposal.
2. IIM Mumbai reserves the right to verify the authenticity of any document submitted. Any falsified or misrepresented information will result in disqualification.

3. IIM Mumbai may, at its discretion, seek clarifications or additional information from the bidder before finalizing the eligibility status.
4. The decision of IIM Mumbai regarding the eligibility of bidders shall be final and binding.
5. Bidders meeting all eligibility criteria will be shortlisted for opening of Format II (EMD) and further technical evaluation (Format III).

5. EVALUATION OF BIDS

The bid documents shall be evaluated based on the criteria mentioned in this section. IIM Mumbai may request supplementary information or additional documents from bidders, if required, to address any inadequacy or ambiguity in the submitted information. All such communications shall be conducted through the official email address of Administrative Officer (IPSS) at ipss@iimmumbai.ac.in/ao.ipss@iimmumbai.ac.in. IIM Mumbai shall not be responsible for any delays in receiving responses from bidders.

The evaluation will be carried out in four stages as described below:

5.1 Evaluation of Format I (Minimum Eligibility Criteria)

The documents received in Format I shall be evaluated based on the Minimum Eligibility Criteria mentioned in Section 4 of this RFP.

Only those bidders who meet all the specified eligibility criteria shall be shortlisted for further evaluation.

IIM Mumbai reserves the right to seek clarification or additional documentation from bidders during this process. Bidders satisfying all eligibility conditions shall be considered for subsequent evaluation of Format II (EMD) and Format III (Technical Bid).

5.2 Evaluation of Format II (EMD)

The Earnest Money Deposit (EMD) or valid MSE/UDYAM Registration Certificate submitted by the bidder shall be examined for compliance as per the provisions of Section 5.2 of this RFP.

Only those bidders whose EMD (or exemption certificate) is found valid shall be eligible for further consideration of Technical Bids (Format III).

5.3 Evaluation of Format III (Technical Bid)

The Technical Bids of only those bidders who qualify under Format I and II shall be opened and evaluated. Evaluation of the Technical Bid shall be based on documentary evidence and presentation of the bidder's capacity to undertake the assignment as per the scope of work.

5.3.1 Scope of Work Confirmation

Bidders must submit a Scope of Work Confirmation Statement as per Annexure IX duly signed by the Authorized Signatory.

Only those bidders who submit this confirmation shall be considered for detailed technical evaluation.

Failure to submit a duly signed confirmation will result in disqualification from further evaluation.

5.3.2 Technical Evaluation Criteria

Technical bids shall be evaluated based on the parameters given below.

Each parameter shall carry a maximum score, and bidders must secure a minimum technical score to qualify for financial evaluation.

Sr. No.	Criteria	Description	Maximum Points
1	Company Capability	Evaluation of bidder's institutional capability in conducting nationwide field surveys, concurrent evaluations, or impact studies. 10 or above numbers of national survey for Government Departments/Organizations: 5 Marks 5-9 numbers of National Survey for Government Department/Organizations: 3 Marks 2-4 numbers of National Survey for Government Department/Organizations: 1 Marks (Supporting evidence of past assignments, methodologies, and clients must be included as per Annexure V).	5
2	Experience	Experience in conducting national level survey work 10 or above years of Experience: 5 Marks 5-9 years of Experience: 3 Marks 2-4 years of Experience: 1 Marks	5
2	Proposed Team Composition	A. Team Size Total Manpower – 50 and above: 2 Marks	2+3= 5

		Total Manpower – between 30-50: 1 Marks B. Team Experience Manpower having 10 years or more experience and graduates & above: 3 Marks Manpower having 5-9 years of experience and graduates: 2 Marks Manpower between 2-4 years of experience and graduates: 1 Marks (Manpower includes Team Leader, Field Supervisors, and Data Analysts) as per Annexure V. Bidders must submit detailed CVs outlining experience in similar assignments.	
3	Financial stability	Bidders having turnover above 4 cr: 5 Marks Bidders having turnover between 3-4 cr: 3 Marks Bidders having turnover between 2-3 cr: 1 Marks	5
4	Technical Presentation	Presentation by the bidder demonstrating approach, survey methodology, technology integration, data management, quality control, and risk mitigation strategy. Marking Scheme: • Approach and Survey Methodology – 15 Marks • Technology integration – 15 Marks • Data management and Analysis – 10 Marks • Report Generation and Submission – 15 Marks • Quality control -10 Marks • Execution strategy – 5 Marks Clarity, feasibility, and robustness of the proposed work plan and deployment	70

		strategy, including state/UT coverage, survey techniques (digital data collection, tools), and adherence to timelines.	
5	Client Feedback / Reference Verification	Evaluation based on client references submitted by bidders. Client feedback- Excellent for more than 80% cases – 10 Marks Excellent feedback between 50-80% and Very Good/Good in rest of the cases – 7 Marks Excellent less than 50% and Very Good/Good in rest of the cases – 4 Marks No excellent Feedback and Very Good/Good in rest of the cases – 1 Marks IIM Mumbai may contact previous clients to verify authenticity, delivery quality, and adherence to timelines.	10
Total			100

5.3.3 Technical Score and Cut-off Criteria

1. Bidders must secure a minimum of 70 marks out of 100 in the technical evaluation to qualify for the opening of the financial bid.
2. Additionally, bidders must obtain at least 4 marks out of 10 in the client feedback/reference verification criterion.
3. Only those bidders who meet both these cut-offs shall qualify for evaluation of Format IV (Price Bid).
4. The Technical Scores will be normalized on a scale of 100 as follows:

$$\text{Moderated Technical Score} = \left(\frac{\text{Bidder's Raw Technical Score}}{\text{Highest Raw Technical Score}} \right) \times 100$$

This moderated score shall be used for the final Quality-Cost Based Selection (QCBS) evaluation.

5.4 Evaluation of Format IV (Price Bid)

1. The Price Bids of only those bidders who meet the required technical score and client reference threshold shall be opened.
2. The Price Bids shall be verified for completeness, ensuring inclusion of all cost components in the prescribed format (Annexure XI).
3. The bidder quoting the lowest Total Bid Price (L1) shall be awarded a score of 100 for the financial component, and others shall be assigned proportionate scores using the following formula:

$$\text{Financial Score} = \left(\frac{\text{Lowest Bid Price}}{\text{Bidder's Bid Price}} \right) \times 100$$

4. The final selection will be made on a Quality and Cost Based Selection (QCBS) system, where 70% weightage shall be given to the Technical Score and 30% weightage to the Financial Score.

$$\text{Final Score} = (0.70 \times \text{Technical Score}) + (0.30 \times \text{Financial Score})$$

5. The bidder obtaining the highest Final Score shall be recommended for award of work.
6. In case of a tie in final scores, preference shall be given to the bidder with the higher technical score.

5.5 Final Decision

The decision of IIM Mumbai with regard to bid evaluation and selection of the agency shall be final and binding on all bidders.

IIM Mumbai reserves the right to:

- Accept or reject any proposal without assigning reasons.
- Modify, postpone, or cancel the tender at any stage.
- Verify information submitted by bidders at any time.
- Engage alternate or additional agencies if required to meet project timelines.

6. SCOPE OF WORK

6.1 Background

The Indian Institute of Management Mumbai (IIM Mumbai), under the Ministry of Education, Government of India, has been entrusted with undertaking a Concurrent Evaluation Study, which seeks to empower traditional artisans and craftspeople across India through recognition, skilling, credit access, digital inclusion, and marketing support.

The concurrent evaluation will focus on collecting ground-level evidence and assessing the delivery effectiveness of the scheme's components through a combination of quantitative field surveys and qualitative consultations. The objective is to provide actionable insights for improving implementation, beneficiary experience, and future policy design.

6.2 Objective of the Assignment

The primary objectives of the concurrent evaluation are as follows:

1. To assess the impact in creating socio-economic entitlements for artisans and craftspeople across diverse trades and geographies.
2. To understand the operational challenges faced by beneficiaries during registration, training, toolkit disbursal, credit linkage, and digital adoption.
3. To evaluate the effectiveness and relevance of skill training programs, financial assistance, and marketing interventions.
4. To generate state-wise and trade-wise feedback for improving future implementation cycles.
5. To build evidence-based recommendations, ensuring better coverage, inclusivity, and scalability.

6.3 Scope of Work Components

The scope of work is divided into six thematic components, reflecting the structure of the Concurrent Evaluation study of PM Vishwakarma Scheme and its intended outcomes:

Component	Key Evaluation Focus Areas
1. Registration Certificate / ID	• Assess the outreach and accessibility of the registration process.

	• Evaluate the accuracy and efficiency of verification mechanisms (through Gram Panchayats, ULBs, and DICs). • Study the awareness levels and constraints faced by beneficiaries during enrolment. • Examine the perceived value and utility of Certificates/IDs in accessing scheme benefits.
2. Skill Training	• Assess the quality, relevance, and delivery of basic and advanced training programs. • Examine whether training improves productivity, income potential, and market readiness. • Understand barriers to participation (distance, time, awareness, content relevance). • Capture beneficiary feedback on curriculum, trainers, and training infrastructure
3. Toolkit Incentive	• Evaluate the process and timeliness of e-voucher disbursement for toolkits. • Assess the appropriateness and usefulness of provided tools for specific crafts. • Examine the link between toolkit support and productivity improvement. • Identify bottlenecks in procurement or distribution.
4. Credit Support	• Assess the ease of access to loans through partner banks and FIs. • Examine the utilization of credit and its impact on income and enterprise growth. • Identify operational and procedural challenges faced during application and disbursement. • Evaluate the effectiveness of financial inclusion measures under the scheme.
5. Digital Incentive	• Assess beneficiaries' adoption of digital payments and financial literacy outcomes. • Evaluate the relevance and ease of use of digital platforms. • Study behavioural shifts toward cashless transactions. • Identify barriers such as device ownership, connectivity, and digital awareness.
6. Marketing Support	• Assess the impact of marketing assistance on artisans' ability to reach new customers and markets. • Evaluate branding, packaging, and e-

	commerce support provided under the scheme. • Identify artisans’ unmet marketing and promotional needs. • Recommend strategies for enhancing market linkages and visibility.
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6.4 Survey Design and Methodology

The survey will be based on a mixed-method research approach combining quantitative field surveys and qualitative assessments through interviews and focus group discussions.

- Sample Size: 10,000+ beneficiaries across India.
- Sampling Technique: Stratified random sampling across trades, gender, social category, and region (State/UT).

- **Data Collection:**

Primary data through in-person interviews using structured questionnaires on tablets/iPads.

Data linked to a central monitoring dashboard for real-time validation and error checks.

Questionnaire for the field survey (as word document) will be provided by IIM Mumbai. The selected agency will not be allowed to modify/ change the questionnaire without prior approval of IIM Mumbai.

The selected agency is required to translate the question into regional language within the project budget.

- **Coordination and Data Analysis** – Two manpower having data analysis skills to be stationed at IIM Mumbai for 3 months for coordination with field team and data analysis. The cost of the manpower should be included in the overall project cost.
- **Videography and Photography** – Trade wise and cluster wise videography and photography of beneficiaries in each States and UT for development films and case studies.
- **Qualitative Inputs:** Key informant interviews (KII) and Focus Group Discussions (FGDs) with stakeholders including:

Common Service Centres (CSCs)

Skill Training Partners

Banks and Financial Institutions

Gram Panchayats and ULBs

District Collectors and State Nodal Officers

Development and Facilitation Officers (DFO–MSME)

India Post

Domain Experts

A Minimum 500 stakeholders from above 8 categories will be interviewed. The locational distribution of the stakeholders will be decided during the conduct of the study.

A Minimum of 100 FDGs to be conducted taking at least one per state/UT covering both beneficiaries and other stakeholders.

6.5 Geographic Coverage of the Field Survey

The survey shall cover all States and Union Territories (except Tamil Nadu and West Bengal) as per the direction of the Ministry.

The indicative sample distribution is as follows:

Region Category	Sample Size per State/UT
States (excluding NE / Hill States / UTs)	Up to 500 respondents each
NE States / Hill States / Goa / UT of J&K	Up to 250 respondents each
Other UTs	Up to 100 respondents each
Total Sample Size	10,000 + respondents

6.6 Implementation Plan

The assignment will be completed over a period of eight (8) weeks from the date of commencement.

Key stages are outlined below:

Phase	Activities	Duration
Phase 1: Preparatory Work	Finalization of scope, survey design, state allocation, and field team onboarding.	3 Days
Phase 2: Pilot Study including Pilot Study Report	Preparation and testing of the survey tool; pilot implementation in Maharashtra, Karnataka, Assam and J&K for validation.	5 Days
Phase 3: Training of Enumerators	Modification of questionnaire if required and training to enumerators.	1 Day
Phase 4: Field Survey	Full-scale data collection across selected States/UTs.	21 Days
Phase 5: Data Analysis & Draft Report	Cleaning, coding, statistical analysis, and preparation of the draft report.	7 Days
Phase 6: Final Report	Revision of report including rework and additional data correction if required.	7 days after receiving the

		comments on draft report
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6.7 Deliverables

The selected survey agency shall provide the following deliverables to IIM Mumbai:

1. **Inception Report** detailing methodology, sample frame, field deployment plan, and quality assurance measures.
2. **Pilot Study Report** validating questionnaire and data-collection process.
3. **Daily and Weekly Progress Dashboards** during fieldwork with response tracking.
4. **Clean and validated dataset** in Excel/SPSS format.
5. **Draft Analytical Report** summarizing field findings, patterns, and insights.
6. **Final Consolidated Report** incorporating stakeholder feedback.
7. **Presentation Decks and Visualization Outputs** for dissemination meetings.
8. **Photography and Videography**

7 PAYMENT PLAN

The payment to the selected agency shall be made on a milestone basis, subject to satisfactory completion of deliverables and approval by IIM Mumbai's Project Steering Committee.

All payments shall be made in Indian Rupees (INR) through NEFT/RTGS within 15 working days from the date of receipt of invoice and approval of deliverables by IIM Mumbai.

Applicable taxes, TDS, and deductions shall be made in accordance with Government of India rules.

7.1 Schedule of Payment

Installment No.	Stage / Milestone	Deliverables / Outputs Required	Percentage of Total Contract Value Payable
1	Inception and Mobilization Stage	Submission and approval of Inception Report, including finalized sampling plan, survey instruments, state allocation, quality assurance protocol, and fieldwork schedule.	20%

2	Pilot Testing Completion and submission of Pilot study report.	Successful completion of pilot survey in Maharashtra, Karnataka, Assam and J&K, incorporating feedback, finalization of tools, and readiness for pan-India rollout.	10%
3	Mid-Term Progress	Completion of 50% of the total sample size (5,000 beneficiaries) verified through IIM Mumbai monitoring dashboard, along with interim progress report and data quality summary.	25%
4	Full Data Collection Completion	Completion of 100% data collection (10,000 beneficiaries) and submission of raw and cleaned datasets in Excel/SPSS formats; confirmation through field audit by IIM Mumbai team.	25%
5	Final Report Submission and Acceptance	Submission of the Final Evaluation Report (hard and soft copies), including analysis, recommendations, infographics, and regional dissemination presentations; acceptance by IIM Mumbai.	20%

7.2 Conditions of Payment

1. Each instalment shall be released only upon submission of the deliverables listed above, and after written acceptance by the Project Coordinator, IIM Mumbai.
2. Payments shall be released to the agency upon submission of invoice, performance security confirmation, and deliverable approval certificates.
3. No advance payment shall be made under this contract.
4. Any delay in submission of deliverables without prior written approval from IIM Mumbai shall attract penalties as specified in Section 11.2 (Penalty for Delay).
5. IIM Mumbai reserves the right to withhold payments until deficiencies, if any, are rectified to its satisfaction.
6. The Final Payment (20%) shall be released only after submission of the final approved report, all data files, field photos, and presentation to IIM Mumbai and the Ministry.
7. The selected agency shall maintain complete audit trails and produce relevant supporting documents when requested by IIM Mumbai or audit authorities.

7.3 Taxes and Deductions

- The quoted financial bid shall be inclusive of all taxes, duties, levies, and travel costs.
- Statutory deductions such as TDS, GST-TDS, or others shall be applied as per prevailing rules.
- The bidder shall be solely responsible for compliance with all applicable tax and labor laws.

7.4 Reimbursement and Disallowances

- No separate reimbursement shall be made for travel, lodging, boarding, or communication expenses, as these must be included in the overall contract value.
- Any unapproved or delayed deliverable may lead to proportionate deduction from the corresponding payment milestone.
- In case of unsatisfactory performance or non-completion of work, IIM Mumbai reserves the right to terminate the contract and forfeit the performance security.

8. RESOURCE REQUIREMENTS

The selected agency shall deploy an adequately qualified and experienced team to ensure the smooth execution of the concurrent evaluation across all phases from planning and data collection to analysis, reporting, and coordination with IIM Mumbai. The agency must maintain sufficient technical, analytical, and field capacity to handle the large-scale survey operation efficiently and to adhere to the stipulated timelines.

All personnel engaged in the project shall possess a minimum of a graduate degree from a recognized university/ institution and shall have relevant experience in field data collection, supervision, or data management activities. The overall team composition must be balanced to include personnel with expertise in field operations, data verification, statistical analysis, and documentation.

The survey agency shall ensure that two dedicated representatives are stationed at IIM Mumbai throughout the project period. These personnel will be responsible for day-to-day coordination, progress reporting, and dashboard updates related to the field survey. They shall work in close liaison with the project coordinators at IIM Mumbai to ensure seamless communication between field teams and the institutional monitoring unit. The representatives must be available on all working days to provide status updates, reconcile field data submissions, and assist in preparing weekly progress summaries.

All enumerators engaged in the survey shall be well-trained, fluent in local languages, and capable of using digital data-collection tools (such as tablets, CAPI, or ODK-based applications). They should be sensitized to ethical field practices, respondent confidentiality,

and data quality assurance protocols. The agency shall provide comprehensive training to its entire field team before deployment, covering aspects of the questionnaire, sampling logic, digital data entry, and troubleshooting procedures.

The analytical component of the project shall be managed by personnel with academic backgrounds in economics, statistics, or related quantitative disciplines. These professionals shall be responsible for data validation, cleaning, statistical analysis, and preparation of analytical reports in consultation with IIM Mumbai's research team. They will be expected to use standard analytical tools such as SPSS, R, STATA, or Python and ensure consistency between raw survey data and reported indicators.

The agency shall also maintain an internal monitoring mechanism to oversee the progress and quality of data collection across all states and union territories covered under the assignment. Regular internal quality audits, random back-checks, and field validations must be conducted to ensure data reliability and adherence to the approved methodology.

The entire project team must demonstrate professionalism, adherence to ethical standards, and commitment to timelines as laid down in the work order. IIM Mumbai reserves the right to review or suggest changes in team deployment if the performance or availability of resources is found inadequate during the course of the project.

9.TENURE OF AGREEMENT

The tenure of the Agreement shall be for a period not exceeding six (6) months from the date of issuance of the Work Order by IIM Mumbai. The said tenure shall include the total duration required for field operations, data analysis, report preparation, validation, and submission of all deliverables as stipulated in the RFP.

In exceptional circumstances, where the assignment could not be completed within the stipulated timeframe due to reasons beyond the control of the selected agency (such as natural calamities, restrictions imposed by government authorities, or other force majeure events), IIM Mumbai may, at its sole discretion, grant an extension of the contract period. Such extension shall be subject to satisfactory justification provided by the agency and without any additional financial implications to IIM Mumbai.

The decision of IIM Mumbai in this regard shall be final and binding. No separate claim for escalation of cost, remuneration, or extension fee shall be entertained under any circumstances.

10. PRICE VALIDITY PERIOD

The quoted prices shall remain firm and valid for a period of 120 (one hundred and twenty) days from the date of closure of this RFP.

During this period, the bidder shall not be permitted to withdraw, revise, or modify the prices quoted in the financial proposal.

Any extension of the bid validity period, if required by IIM Mumbai, shall be communicated in writing to the bidders, and acceptance of such extension shall be mandatory for consideration of the proposal.

No revision in the price or terms shall be allowed during the extended validity period.

The quoted prices must be inclusive of all applicable taxes, duties, levies, service charges, and expenses necessary for the successful completion of the assignment. Any omission on the part of the bidder to include such charges shall not entitle them to claim reimbursement at a later date.

11. OTHER KEY TERMS AND CONDITIONS OF PROJECT AGREEMENT

The selected agency shall execute an Agreement with IIM Mumbai within **three (3) working days** from the issuance of the Work Order. The Agreement shall be governed by the terms and conditions set forth in this RFP and any subsequent correspondence or clarifications mutually agreed upon.

The following terms and conditions shall form an integral part of the Project Agreement:

11.1 Performance Security

- The selected agency shall furnish a Performance Security equivalent to 10% of the total contract value in the form of a Bank Guarantee from a scheduled or nationalized bank, valid for a period extending three months beyond the contract completion date at the time of signing of agreement.
- The Performance Security shall be released only after satisfactory completion of all deliverables and acceptance of the final report by IIM Mumbai.
- The Performance Security is liable to be forfeited in the event of non-performance, breach of contract terms, or withdrawal from the assignment without due authorization.

11.2 Penalty for Delay

- Time is of the essence in this project. In the event of delay in completion of any milestone or deliverable beyond the agreed schedule without prior approval from IIM Mumbai, a penalty at the rate of 5% of the total contract value per week of delay shall be imposed.

11.3 Termination of Contract

IIM Mumbai reserves the right to terminate the Agreement under any of the following conditions:

1. Default or breach in the performance of obligations by the agency.
2. Delay in deliverables exceeding four weeks beyond the approved timeline.
3. Submission of false or misleading information during the bidding or execution stage.
4. Misconduct, negligence, or fraud on the part of the agency or its representatives.
5. Continuous non-performance of 5 weeks will lead to termination of contract.

In such cases, IIM Mumbai may terminate the contract after giving a written notice of 7 working days, and the agency shall not be entitled to any compensation or claim. The decision of IIM Mumbai in this regard shall be final.

11.4 Force Majeure

Neither party shall be held responsible for failure or delay in performance of obligations due to circumstances beyond their reasonable control such as natural disasters, war, pandemics, strikes, or government-imposed restrictions.

The affected party shall notify the other party in writing within **three (3) days** of the occurrence of such event, with adequate evidence.

If the delay continues beyond **30 days**, either party may terminate the agreement with mutual consent, without any financial liability.

11.5 Confidentiality and Data Ownership

All information, data, reports, and materials collected or generated during the course of the assignment either in soft or hard copy shall be the exclusive property of IIM Mumbai.

The agency shall not, without prior written permission, disclose or use any data or findings for publication, commercial use, or any purpose other than this assignment.

A Non-Disclosure Agreement (NDA) shall be signed prior to commencement of the work.

11.6 Sub-Contracting and Staffing

The selected agency shall not assign, sub-contract, or transfer any portion of the contract to another party without the prior written approval of IIM Mumbai.

The key personnel identified in the technical proposal must remain engaged throughout the duration of the project. Any replacement shall be made only with equally or more qualified personnel and must be approved in writing by IIM Mumbai.

11.7 Intellectual Property Rights

All study designs, tools, questionnaires, analytical models, and reports prepared under this assignment shall be deemed to be the intellectual property of IIM Mumbai. The agency shall have no rights of ownership, authorship, or publication over such materials.

11.8 Arbitration and Jurisdiction

Any dispute, difference, or claim arising out of or relating to this Agreement shall be resolved through mutual consultation.

If unresolved, the matter shall be referred to arbitration under the Arbitration and Conciliation Act, 1996. The arbitration proceedings shall be held in Mumbai, and the language of arbitration shall be English.

The courts in Mumbai shall have exclusive jurisdiction over all matters relating to this Agreement.

11.9 Governing Law

This Agreement shall be governed by and construed in accordance with the **laws of India**, and all proceedings arising therefrom shall be subject to the jurisdiction of the competent courts at Mumbai.

12. NON-DISCLOSURE AGREEMENT (NDA)

The selected bidder shall be required to sign a Non-Disclosure Agreement (NDA) with Indian Institute of Management Mumbai (IIM Mumbai) prior to the issuance of the formal Work Order.

This Agreement will govern the confidentiality obligations of the selected agency with respect to any information, data, reports, or materials whether oral, written, or electronic made available or generated during the course of the assignment.

The NDA shall ensure that:

- All project-related data, documents, beneficiary information, and analytical outputs remain the exclusive property of IIM Mumbai.
- The selected agency, its employees, associates, and sub-contractors (if any) shall not disclose, reproduce, share, or disseminate any information obtained during the execution of the assignment to any person or entity without the prior written consent of IIM Mumbai.
- The confidentiality obligations shall survive the completion or termination of the contract.

- Any violation of the NDA will constitute a material breach of the contract and will render the agency liable for termination, forfeiture of performance security, and legal action.

A draft NDA containing detailed terms and conditions is provided in Annexure XIV of this document.

Execution of this agreement by the selected bidder shall be a pre-requisite for issuance of the Work Order and commencement of project activities.

13. SERVICE DELIVERY AGREEMENT (SDA)

Following the completion of all pre-award formalities, the selected bidder shall enter into a Service Delivery Agreement (SDA) with IIM Mumbai within three (3) working days from the date of issuance of the Letter of Award.

The SDA will formalize the contractual relationship between IIM Mumbai and the selected agency, and will clearly define the scope, deliverables, timelines, payment milestones, obligations, and liabilities of both parties.

The principal provisions of the Service Delivery Agreement shall include, but not be limited to, the following:

1. Scope of Services – Detailed statement of work, coverage, methodology, and deliverables as outlined in Section 6 of this RFP.
2. Project Timelines – Agreed implementation schedule for completion of all phases within the overall tenure defined in Section 6.6.
3. Performance Security – Amount, form, validity, and conditions for invocation or release as per Section 11.1.
4. Payment Terms – Milestone-linked payment plan as per Section 7.1, including applicable deductions and retention conditions.
5. Confidentiality and Intellectual Property Rights – Reference to the executed NDA and reiteration that all project outputs, databases, and reports are the intellectual property of IIM Mumbai.
6. Monitoring and Reporting Mechanism – Specification of progress-review procedures, submission formats, and escalation protocols for delays or non-compliance.
7. Termination Clause – Conditions and procedure for early termination due to non-performance, delay, or breach of contract.
8. Force Majeure and Dispute Resolution – Applicable provisions as stated in Section 11.4 and 11.8 of this RFP.

9. Governing Law and Jurisdiction – The Agreement shall be governed by the laws of India, and any dispute shall be subject to the exclusive jurisdiction of the courts in Mumbai.

The SDA shall come into force from the Effective Date specified in the Work Order and shall remain valid until successful completion of all deliverables and acceptance of the Final Report by IIM Mumbai.

Failure to execute the Service Delivery Agreement within the stipulated time may result in cancellation of the award and forfeiture of the Performance Security at the discretion of IIM Mumbai.

Annexure

Annexure – I

COVERING LETTER

(To be printed on the bidder's official letterhead with company seal and authorized signature)

Date: _____

To

Chief Administrative Officer
Indian Institute of Management Mumbai
Vihar Lake Road, Powai
Mumbai – 400 087

Subject:

Submission of Proposal for “National Concurrent Evaluation of Artisan and Livelihood Support Initiatives – 2025”

Sir/Madam,

With reference to your Request for Proposal (RFP) No. IIMM/2025-26/RFP/CEALS/01 dated _____, we, the undersigned, having examined the RFP and its amendments, if any, and understood its contents, hereby submit our proposal for the captioned assignment in accordance with the terms and conditions of the RFP.

We hereby declare that:

1. We have read and understood the terms and conditions laid down in the RFP document in full and agree to abide by them unconditionally.
2. We have examined the details of the assignment as contained in the RFP and confirm that we possess the required professional competence, experience, and financial capability to undertake the proposed assignment.
3. Our organization has not been blacklisted, debarred, or declared ineligible by any Central or State Government Department, Public Sector Undertaking, or Multilateral Organization.
4. The information, documents, and data furnished in our proposal are true and correct to the best of our knowledge and belief. We understand that any misrepresentation or false statement shall render our bid liable for rejection and may lead to termination of the contract if awarded.

5. We hereby agree to keep our proposal valid for 120 days from the date of closure of the RFP, as stipulated in the document.
6. If our bid is accepted, we undertake to initiate the work within the prescribed time frame and to complete the assignment as per the terms specified in the Work Order.
7. We understand that IIM Mumbai is not bound to accept any or all proposals and reserves the right to cancel or modify the process without assigning any reason.
8. We further undertake that all project-related data, reports, and documents generated during the course of the assignment shall remain the exclusive property of IIM Mumbai and shall not be used for any purpose other than the performance of this contract.

We enclose herewith the supporting documents as required in Format (Minimum Eligibility Criteria) and confirm that we have included all information required for your evaluation.

Thanking you,

Yours faithfully,

For and on behalf of

(Name of the Organization)

Authorized Signatory: _____

Name: _____

Designation: _____

Address: _____

Email ID: _____

Contact Number: _____

Company Seal: _____

Annexure – II

DETAILS OF THE BIDDER / ORGANIZATION INFORMATION FORM

(To be printed on the bidder's official letterhead and signed by the Authorized Signatory)

1. Name of the Organization:

2. Registered Address of Head Office:

PIN: _____

3. Correspondence Address (if different from above):

4. Contact Details:

- Telephone No.: _____
- Mobile No.: _____
- Official Email ID: _____
- Website (if any): _____

5. Year of Incorporation / Establishment:

6. Legal Status of the Entity:

- ☐ Company (as per Companies Act, 2013)
- ☐ Registered Society
- ☐ Trust
- ☐ Partnership / LLP
- ☐ Proprietorship
- ☐ Other (Please specify): _____

7. Registration Details:

- Registration Number: _____
- Place of Registration: _____

- Date of Registration: _____

8. GST Registration No.: _____

9. PAN (Permanent Account Number): _____

10. Type of Organization / Nature of Business:

- ☐ Research / Consulting Organization
- ☐ NGO / Social Enterprise
- ☐ Academic / Training Institute
- ☐ Survey and Evaluation Agency
- ☐ Other (Please specify): _____

11. Name, Designation, and Contact Details of Authorized Representative:

- Name: _____
- Designation: _____
- Mobile No.: _____
- Email ID: _____

12. Name and Contact of Authorized Signatory (for this Proposal):

- Name: _____
- Designation: _____
- Address: _____
- Mobile No.: _____
- Email ID: _____

13. Bank Details for Payment (for future reference):

- Account Holder's Name: _____
- Name of the Bank: _____
- Branch Address: _____
- Account No.: _____
- IFSC Code: _____
- Type of Account: _____

14. Financial Summary of the Organization (in INR Lakhs):

Financial Year Annual Turnover Net Worth CA Certification Attached (Yes/No)

FY 2021–22

Financial Year Annual Turnover Net Worth CA Certification Attached (Yes/No)

FY 2022–23

FY 2023–24

(Attach copies of audited financial statements or a CA certificate as proof.)

15. Past Experience in Similar Assignments (Summary):

Provide details of similar national/state-level survey, evaluation, or impact assessment projects undertaken in the last five years.

16. Office / Field Presence (Regional / State Offices):

List locations of offices or local representatives in various States/UTs.

(Attach separate sheet if required.)

17. Organizational Infrastructure and Human Resources:

Briefly describe total staff strength (full-time and field staff) and key technical capacities in survey operations, data analytics, and project management.

18. Declaration:

We hereby certify that the information provided above is true and correct to the best of our knowledge. Any misrepresentation or false statement may lead to disqualification or termination of contract at any stage.

Authorized Signatory: _____

Name: _____

Designation: _____

Seal of the Organization: _____

Date: _____

Place: _____

Annexure III – Letter of Authorization

(To be submitted on the Bidder's Official Letterhead)

Date: _____

To

Chief Administrative Officer
Indian Institute of Management Mumbai
Vihar Lake Road, Powai
Mumbai – 400 087

Subject:

Letter of Authorization for Submission of Bid

Sir/Madam,

We, the undersigned, hereby authorize **Mr./Ms.** _____,
holding the designation of _____, to act on our behalf for
all purposes related to the submission of our bid for the assignment titled:

“Concurrent Evaluation study of PM Vishwakarma Scheme”

including, but not limited to:

- Signing and submitting the proposal and all supporting documents,
- Providing clarifications, supplementary information, or additional documents as required by IIM Mumbai,
- Participating in meetings, presentations, or negotiations (if any),
- Receiving communications and notices from IIM Mumbai,
- Undertaking any other activities required for the bid on behalf of our organization.

We confirm that **all acts carried out by the authorized representative** shall be deemed legally binding on our organization for the purposes of this RFP and any subsequent contract award.

This authorization is issued under the authority of our organization's official resolution dated _____.

Details of Authorized Representative

- **Name:** _____
- **Designation:** _____
- **Email ID:** _____
- **Mobile Number:** _____
- **Signature:** _____

For (Name of the Organization)

We hereby affirm that the information contained in this Letter of Authorization is true and correct.

Authorized Signatory 1:

Name: _____

Designation: _____

Signature: _____

Authorized Signatory 2 (if applicable):

Name: _____

Designation: _____

Signature: _____

(Organization Seal)

Witnesses

1. Name: _____ Signature: _____

2. Name: _____ Signature: _____

Annexure IV – CVs of Key Resources

(To be submitted on the Bidder's Official Letterhead)

CURRICULUM VITAE (CV) OF KEY PROFESSIONAL STAFF

(One CV per proposed resource. Please follow the format strictly.)

1. Name of the Professional:

2. Position Proposed for the Assignment:

(e.g., Project Manager / Field Supervisor / Data Analyst / Quality Controller)

3. Name of the Firm:

4. Date of Birth:

5. Nationality:

6. Educational Qualifications:

Degree	Institution/University	Specialization	Year of Passing
--------	------------------------	----------------	-----------------

7. Total Years of Experience:

8. Relevant Experience for this Assignment:

(Describe experience related specifically to large-scale surveys, evaluations, monitoring studies, CAPI-based data collection, etc.)

Organization / Project Name	Role & Responsibilities	Duration (From– To)	Key Deliverables
--------------------------------	----------------------------	------------------------	---------------------

(Attach additional sheets if required.)

9. Languages Known:

Language	Reading	Writing	Speaking

10. Technical Skills:

(Mention relevant skills such as: CAPI tools, mobile data collection platforms, statistical analysis software, field supervision, data cleaning, etc.)

11. Training / Certifications (if any):**12. Employment Record:**

(Please list from the most recent job backwards.)

Employer Position Held From–To Key Tasks / Responsibilities

13. Availability for the Assignment:

☒ Full-Time / ☐ Part-Time

Proposed Duration of Engagement: _____

14. Declaration by the Professional

I, the undersigned, certify that—

- The details furnished above are true and correct to the best of my knowledge.
- I shall be available for the assignment as per the proposed timelines.
- I understand that any false information or misrepresentation may result in disqualification.

Signature of the Professional: _____

Name: _____

Date: _____

15. Certification by the Authorized Signatory of the Firm

I hereby certify that the above CV has been verified and the professional has the required qualifications and experience to undertake the proposed responsibilities in the assignment titled:

“Concurrent Evaluation study of PM Vishwakarma Scheme”

Authorized Signatory: _____

Name: _____

Designation: _____

Organization Seal: _____

Date: _____

Annexure V– Company Capability Statement

(To be submitted on the Bidder's Official Letterhead)

Date: _____

To

Chief Administrative Officer
Indian Institute of Management Mumbai
Vihar Lake Road, Powai
Mumbai – 400 087

COMPANY CAPABILITY STATEMENT

(This statement should provide a comprehensive overview of the Bidder's capability to execute large-scale survey, evaluation, and research assignments.)

1. Organization Profile

- **Name of the Organization:** _____
- **Year of Establishment:** _____
- **Legal Status:** Pvt. Ltd. / LLP / Partnership / Society / Trust / Others
- **Registered Address:** _____
- **Corporate / Branch Offices:** _____
- **Contact Person:** _____
- **Email / Phone:** _____

2. Core Competencies

(Briefly describe the organization's strengths relevant to this assignment)

Examples:

- Large-scale field survey implementation (urban & rural)
- Concurrent evaluation & monitoring studies
- Use of CAPI-based data collection platforms
- State-wide & nationwide sampling and deployment capability
- Statistical analysis, econometric modelling, dashboard reporting

- Stakeholder interviews, qualitative research, and case study development

3. Experience in Similar Assignments

Provide details of major relevant projects executed in the last 5 years.

Sl. No.	Project Title	Client / Ministry / Agency	Geographical Coverage	Sample Size / Scale	Project Value (INR)	Year
1						
2						
3						

Attach completion certificates / work orders where applicable.

4. Technical Infrastructure & Tools

Describe systems available for the project, such as:

- Tablets/mobile devices for CAPI surveys
- Cloud-based data collection platforms (ODK / Kobo / CSPro / SurveyCTO)
- Data dashboards for monitoring field progress
- Secure servers and encrypted data storage protocols
- Statistical software: R, STATA, SPSS, Python
- Team communication systems and field tracking modules

5. Human Resource Strength

Provide a summary of the organization's team capability:

Category	Number of Staff Available
----------	---------------------------

Permanent Research Staff

Field Supervisors

Enumerators (on-roll/on-panel)

Data Analysts / Statisticians

Category	Number of Staff Available
----------	---------------------------

Project Managers

Monitoring & QC Team

Detailed CVs to be submitted separately in the CV Annexure.

6. Regional / State Deployment Ability

Indicate whether the organization has:

- In-house teams in multiple states
- Partnerships with local agencies
- Ability to mobilize teams within 48–72 hours
- Prior experience working across large geographies

(State names may be listed here.)

7. Quality Assurance Framework

Explain key QA systems:

- Multi-level data validation
- GPS-tagging, time-stamping, and audio audits
- Supervisor back-checks and spot verifications
- Pre-defined QC protocols & escalation procedures
- Data cleaning SOPs and error-reduction systems

8. Financial Capacity

Provide a brief summary:

Financial Year Turnover (INR Crores) Net Worth

2022–23

2021–22

2020–21

(Audited financial statements to be enclosed separately.)

9. Declaration

We hereby declare that:

- The information provided above is true and accurate.
- Our organization has the capacity, experience, and resources required to undertake the assignment titled:
“Concurrent Evaluation study of PM Vishwakarma Scheme”
- We agree to adhere to all terms and conditions mentioned in the RFP issued by IIM Mumbai.

Authorized Signatory: _____

Name: _____

Designation: _____

Organization Seal: _____

Date: _____ **Place:** _____

Annexure – VI

NO CONVICTION / NO BLACKLISTING DECLARATION

(To be printed on the organization's letterhead and signed by the Authorized Signatory)

Date: _____

To

Chief Administrative Officer
Indian Institute of Management Mumbai
Vihar Lake Road, Powai
Mumbai – 400 087

Subject:

Declaration of Non-Conviction and Non-Blacklisting

Sir/Madam,

We, the undersigned, hereby declare that **(Name of Organization)**, having its registered office at **(Address)**, has not been:

1. **Blacklisted or debarred** by any Central or State Government Department, Public Sector Undertaking, Autonomous Body, or Multilateral Agency in India or abroad, for any reason whatsoever.
2. **Convicted or prosecuted** under any law for offenses involving moral turpitude, corruption, or financial irregularities.
3. **Involved in any litigation or proceedings** pending before any court or tribunal that may affect our ability to deliver the services under this assignment.
4. **Declared insolvent or bankrupt**, nor has any winding-up order been passed against our organization.

We further declare that all information and documents submitted as part of our proposal are true, correct, and complete in all respects. We understand that any misrepresentation or concealment of facts shall render our proposal liable for rejection and may lead to termination of contract and forfeiture of performance security, if awarded.

This declaration is made in good faith, in full knowledge of the facts and circumstances of the RFP titled:

“Concurrent Evaluation study of PM Vishwakarma Scheme”

Authorized Signatory: _____

Name: _____

Designation: _____

Organization Name: _____

Seal of the Organization: _____

Date: _____

Place: _____

Annexure – VII

CONFIRMATION OF PROJECT COMPLETION FOR SIMILAR ASSIGNMENTS

(To be printed on organization letterhead and signed by Authorized Signatory)

Date: _____

To

Chief Administrative Officer
Indian Institute of Management Mumbai
Vihar Lake Road, Powai
Mumbai – 400 087

Subject:

Confirmation of Completion of Similar Assignments

Sir/Madam,

This is to certify that **(Name of Organization)** has successfully completed the following projects of similar nature and scope related to field surveys, impact evaluations, or concurrent assessments for Central/State Government Departments, Public Sector Undertakings, or Multilateral Agencies during the past five financial years.

Sl. No.	Title / Description of Assignment	Client / Funding Agency	Geographical Coverage (States/UTs)	Sample Size / Scale	Contract Value (INR)	Date of Commencement	Date of Completion
1							
2							
3							
4							
5							

We certify that the above information is true and correct and that the projects mentioned were completed satisfactorily within the contractual timelines.

Supporting copies of the Work Orders / Completion Certificates / Client Letters for the above assignments are enclosed herewith for verification.

We understand that the absence of adequate documentary evidence may result in non-consideration of the project for eligibility or technical evaluation.

Authorized Signatory: _____

Name: _____

Designation: _____

Organization Name: _____

Seal of the Organization: _____

Date: _____

Place: _____

Annexure – VIII

DETAILS OF SIMILAR ASSIGNMENTS EXECUTED BY THE BIDDER

(To be printed on official letterhead and signed by the Authorized Signatory)

Date: _____

To

Chief Administrative Officer
Indian Institute of Management Mumbai
Vihar Lake Road, Powai
Mumbai – 400 087

Subject:

Details of Similar Assignments Executed in the Last Five Years

Sir/Madam,

We hereby submit the details of similar assignments undertaken by our organization during the past five (5) financial years for Central / State Government Departments, Public Sector Undertakings, Autonomous Bodies, or Multilateral Organizations.

Sl. N o.	Title / Descript ion of Assignm ent	Clie nt / Agen cy	Nature of Work (Evaluat ion / Survey / Impact Study)	Geograph ical Coverage (States / UTs)	Sample Size / Respond ents	Contr act Value (INR)	Durati on (Mont hs)	Date of Complet ion
1								
2								
3								
4								

Certified copies of Work Orders and Completion Certificates for each of the above assignments are enclosed for verification.

We confirm that the projects listed above were completed satisfactorily and in accordance with the respective contract terms and conditions.

Authorized Signatory: _____

Name: _____

Designation: _____

Organization Name: _____

Seal of Organization: _____

Date: _____ **Place:** _____

Annexure – IX

CONFIRMATION OF SCOPE OF WORK AND COMPONENTS OF EVALUATION

(To be printed on official letterhead and signed by the Authorized Signatory)

Date: _____

To

Chief Administrative Officer
Indian Institute of Management Mumbai
Vihar Lake Road, Powai
Mumbai – 400 087

Subject:

**Confirmation of Scope of Work and Evaluation Components under RFP No.
IIMM/2025-26/RFP/CEALS/01**

Sir/Madam,

We hereby confirm that we have read, understood, and agree to the entire Scope of Work specified in Section 6 of the RFP for the assignment titled
“National Concurrent Evaluation of Artisan and Livelihood Support Initiatives – 2025.”

We further undertake to carry out the survey and evaluation activities in accordance with the methodology and coverage outlined by IIM Mumbai, covering all six thematic components listed below:

1. **Registration and Identification of Beneficiaries** – Assessment of outreach, registration mechanism, and ease of access to scheme benefits.
2. **Skill Training** – Evaluation of training content, delivery methods, quality standards, relevance to trade skills, and impact on productivity.
3. **Toolkit Incentive** – Analysis of timeliness, adequacy, and utility of toolkits received by beneficiaries and their effect on productivity.
4. **Credit Support** – Examination of financial access, utilization of credit, and impact on income and enterprise growth.
5. **Digital Incentive and Financial Inclusion** – Review of digital literacy levels, use of digital payment systems, and integration into formal financial channels.

6. **Marketing Support and Market Linkages** – Evaluation of branding, packaging, sales platforms, and effectiveness of market access initiatives for artisans and craft enterprises.

We also affirm our commitment to undertake the following tasks as part of the overall scope:

- Conduct of field surveys covering 10,000+ beneficiaries across States and Union Territories as specified by IIM Mumbai.
- Conduct survey of 500+ Stakeholders across States and Union Territories as specified by IIM Mumbai.
- Use of digital survey tools for data collection and real-time monitoring through a central dashboard.
- Use of 2 manpower stationed at IIM Mumbai for coordination and data analysis.
- Periodic submission of progress reports with respect to Pilot study report, Draft report and final report and data validation summaries as specified by IIM Mumbai.
- Coordination with IIM Mumbai officials for data review, field audits, and presentation of findings.
- Preparation of draft and final evaluation reports with statistical and visual analysis.

We undertake to carry out all the above activities within the prescribed timeline and in accordance with the terms and conditions of the RFP.

Authorized Signatory: _____

Name: _____

Designation: _____

Organization Name: _____

Seal of Organization: _____

Date: _____ **Place:** _____

Annexure – X

CLIENT REFERENCE DETAILS

(To be printed on the organization's letterhead and signed by the Authorized Signatory)

Date: _____

To

Chief Administrative Officer
Indian Institute of Management Mumbai
Vihar Lake Road, Powai
Mumbai – 400 087

Subject:

Client References for Similar Assignments Executed

Sir/Madam,

We hereby provide details of clients for whom our organization has successfully undertaken survey, evaluation, or impact-assessment assignments of similar nature during the last five financial years.

Sl. No .	Client Organization Name / Department	Contact Person (Name & Designation)	Email ID / Phone Number	Title of Assignment / Project Description	Project Duration	Contract Value (INR)	Status (Completed / Ongoing)
1							
2							
3							
4							

We authorize IIM Mumbai to contact the above clients for verification of credentials and performance related to the referenced assignments. We understand that failure to provide valid or responsive references may lead to reduced technical scores or disqualification from further evaluation.

Authorized Signatory: _____

Name: _____

Designation: _____

Organization Name: _____

Seal of Organization: _____

Date: _____ **Place:** _____

Annexure – XI

PRICE BID FORMAT

(To be printed on the bidder's official letterhead and signed by the Authorized Signatory)

Date: _____

To

Chief Administrative Officer
Indian Institute of Management Mumbai
Vihar Lake Road, Powai
Mumbai – 400 087

Subject:

Submission of Financial Proposal for “Concurrent Evaluation study of PM Vishwakarma Scheme”

Sir/Madam,

In response to the RFP No. **IIMM/2025-26/RFP/CEALS/01**, we hereby submit our **Price Bid** for undertaking the concurrent evaluation study as per the scope, methodology, and terms & conditions mentioned in the RFP.

The quoted price below is inclusive of all costs towards manpower, travel, training, data collection, supervision, analysis, reporting, taxes, duties, levies, insurance, and any other expenditure necessary for successful completion of the assignment.

A. Financial Quote

Particulars	Amount (INR)
Total Professional Fee for the Assignment (inclusive of all costs and applicable taxes)	₹ _____ (in figures)

Particulars Amount (INR)

Total Amount

in Words: _____

B. Declaration

1. The quoted amount is **firm, fixed, and all-inclusive** for the entire duration of the assignment.
2. No escalation in prices shall be claimed on any ground whatsoever during the validity of the contract.
3. The prices quoted are in strict conformity with the terms and conditions mentioned in the RFP document.
4. We agree that the evaluation of financial bids shall be based on the **Total Amount (inclusive of all taxes)** as quoted above.
5. We also confirm that any arithmetical or typographical errors in our bid shall be subject to correction as per the terms of the RFP, and our acceptance of such correction shall be binding.

Authorized Signatory: _____

Name: _____

Designation: _____

Organization Name: _____

Seal of Organization: _____

Date: _____ **Place:** _____

Annexure – XII

DECLARATION OF ACCEPTANCE OF TERMS AND CONDITIONS

(To be printed on official letterhead and signed by the Authorized Signatory)

Date: _____

To

Chief Administrative Officer
Indian Institute of Management Mumbai
Vihar Lake Road, Powai
Mumbai – 400 087

Subject:

Declaration of Acceptance of all Terms and Conditions of the RFP

Sir/Madam,

We, the undersigned, hereby declare that we have read and fully understood the contents of the **Request for Proposal (RFP)** for the assignment titled
“Concurrent Evaluation study of PM Vishwakarma Scheme”

We agree to abide by all the instructions, conditions, and specifications contained in the RFP and subsequent corrigenda (if any) issued by IIM Mumbai.

We also confirm that we have not proposed any deviation from the terms and conditions mentioned in the document and that our proposal is prepared in strict conformity with the RFP requirements.

We understand that failure to comply with any term or condition during execution of the project may result in termination of the contract and forfeiture of the performance security.

Authorized Signatory: _____

Name: _____

Designation: _____

Organization Name: _____

Seal of Organization: _____

Date: _____ **Place:** _____

Annexure – XIII

UNDERTAKING OF COMPLIANCE AND ETHICAL CONDUCT

(To be printed on the organization's letterhead and signed by the Authorized Signatory)

Date: _____

To

Chief Administrative Officer

Indian Institute of Management Mumbai

Vihar Lake Road, Powai

Mumbai – 400 087

Subject:

Undertaking of Compliance with Project Protocols, Ethical Standards, and Data Confidentiality

Sir/Madam,

In connection with the submission of our proposal for the assignment titled

“Concurrent Evaluation study of PM Vishwakarma Scheme,”

we hereby undertake the following:

1. That our organization shall comply with all applicable laws, rules, and regulations of the Government of India during the conduct of this assignment.
2. That all data collected from beneficiaries or stakeholders will be treated as confidential and will not be disclosed or used for any purpose other than this assignment.
3. That all field personnel shall be adequately trained on ethical data collection practices, informed consent, and data privacy.
4. That all payments to staff, enumerators, and vendors engaged in the project shall be made in a transparent and compliant manner.
5. That no conflict of interest exists between our organization and IIM Mumbai, and we will promptly disclose any such situation if it arises during the project period.
6. That the organization will maintain integrity, impartiality, and accuracy in data collection, processing, and reporting.

We understand that violation of this undertaking may result in immediate termination of the contract, forfeiture of performance security, and legal action under applicable laws.

Authorized Signatory: _____

Name: _____

Designation: _____

Organization Name: _____

Seal of Organization: _____

Date: _____ **Place:** _____

Annexure – XIV

DRAFT NON-DISCLOSURE AGREEMENT (NDA)

This Non-Disclosure Agreement (“Agreement”) is made on this ____ day of _____, 2025, by and between:

Indian Institute of Management Mumbai (IIM Mumbai), an Institution of National Importance under the Ministry of Education, Government of India, having its principal office at Vihar Lake Road, Powai, Mumbai – 400087 (hereinafter referred to as “*IIM Mumbai*”, which expression shall include its successors and assigns),

AND

_____, a company/organization incorporated under the laws of India and having its registered office at _____ (hereinafter referred to as “*the Agency*” or “*the Selected Bidder*”), which expression shall include its successors and permitted assigns.

1. Purpose

IIM Mumbai has agreed to engage the Agency for execution of the assignment titled “**Concurrent Evaluation study of PM Vishwakarma Scheme**”

In the course of execution, both parties may exchange confidential information related to project design, beneficiaries, data, processes, and analysis.

2. Definition of Confidential Information

“Confidential Information” includes all information, data, documents, records, reports, software, codes, survey data, beneficiary details, or other materials disclosed, whether in oral, written, or electronic form, by IIM Mumbai to the Agency or otherwise obtained during project execution.

3. Obligations of the Agency

The Agency shall:

- Maintain strict confidentiality of all project-related information.
- Use the information solely for the purpose of executing the assignment.
- Restrict disclosure of information to only those employees or agents directly involved in the project and ensure their compliance with this NDA.

- Not publish, disseminate, or share any portion of the project data or report without prior written consent of IIM Mumbai.
- Return or destroy all confidential material upon completion or termination of the assignment.

4. Exclusions

The confidentiality obligations shall not apply to information which:

- Is or becomes publicly available without breach of this Agreement.
- Was lawfully in possession of the Agency prior to disclosure.
- Is required to be disclosed by law or government order, provided IIM Mumbai is notified in advance.

5. Duration

This Agreement shall remain valid throughout the tenure of the project and shall survive for **three (3) years** after the completion or termination of the contract.

6. Remedies

Any breach of this Agreement shall be treated as a material breach of the main contract. IIM Mumbai shall have the right to seek injunctive relief, claim damages, or terminate the agreement without prejudice to other remedies available under law.

7. Governing Law and Jurisdiction

This Agreement shall be governed by and construed in accordance with the **laws of India**. Any disputes arising hereunder shall be subject to the exclusive jurisdiction of the courts at **Mumbai, Maharashtra**.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement on the date first above written.

For and on behalf of IIM Mumbai

Signature: _____

Name: _____

Designation: _____

Date: _____

Seal: _____

For and on behalf of the Agency

Signature: _____

Name: _____

Designation: _____

Organization: _____

Date: _____

Seal: _____

Annexure – XV

DRAFT SERVICE DELIVERY AGREEMENT (SDA)

This **Service Delivery Agreement** (hereinafter referred to as the “**Agreement**”) is made on this ____ day of _____, 2025, by and between:

Indian Institute of Management Mumbai (IIM Mumbai), an Institution of National Importance under the Ministry of Education, Government of India, having its office at Vihar Lake Road, Powai, Mumbai – 400 087 (hereinafter referred to as “*IIM Mumbai*”),

AND

_____, a company/organization incorporated under the laws of India and having its registered office at _____ (hereinafter referred to as “*the Agency*” or “*the Service Provider*”).

1. Purpose

This Agreement defines the terms and conditions under which the Agency shall execute the assignment titled

“Concurrent Evaluation study of PM Vishwakarma Scheme”,

as per the RFP No. **IIMM/2025-26/RFP/CEALS/01** issued by IIM Mumbai and the Agency’s accepted proposal.

2. Scope of Work

The Agency shall perform all tasks outlined in the RFP and agreed upon in the Letter of Award, including:

- Conducting beneficiary-level surveys, data collection, and validation;
- Analysis of findings and preparation of periodic and final reports;
- Submission of all deliverables as per timelines prescribed by IIM Mumbai;
- Maintaining confidentiality and adherence to data quality and ethical standards.

3. Duration and Commencement

The assignment shall commence from **20th November 2025(Tentative)** and shall be completed within **eight (8) weeks** from the date of commencement, unless extended by mutual consent.

4. Performance Security

The Agency shall submit a **Performance Security** equivalent to **10% of the total contract value** in the form of a Bank Guarantee valid for three months beyond the completion of the assignment.

5. Deliverables and Payment Terms

Payments shall be released in stages as per milestones defined in the RFP (Section 7.1), subject to satisfactory completion and approval of deliverables by IIM Mumbai.

All payments shall be made through electronic transfer to the Agency's designated bank account.

6. Confidentiality and Intellectual Property

All data, reports, and outputs produced during the course of this project shall be the **exclusive property of IIM Mumbai**.

The Agency shall not disclose or reproduce any part of the project data or findings without prior written consent.

A **Non-Disclosure Agreement (Annexure XIV)** shall form an integral part of this Agreement.

7. Monitoring and Reporting

The Agency shall submit periodic progress updates to IIM Mumbai and maintain coordination with designated officers stationed at IIM Mumbai for real-time status reporting. IIM Mumbai reserves the right to conduct random field checks and data audits.

8. Termination

Either party may terminate this Agreement with a **written notice of 10 working days** in the event of non-performance, delay, or breach of obligations by the other party.

Upon termination, IIM Mumbai shall be entitled to invoke the Performance Security and recover any dues.

9. Force Majeure

Neither party shall be held liable for failure or delay in performance due to causes beyond their reasonable control such as natural calamities, war, or government restrictions.

The affected party shall promptly notify the other in writing within seven (7) days of such occurrence.

10. Dispute Resolution

Any disputes arising under this Agreement shall be resolved amicably through mutual consultation.

If unresolved, the matter shall be referred to **arbitration** under the provisions of the **Arbitration and Conciliation Act, 1996**, with the venue at **Mumbai** and proceedings in **English**.

The courts of **Mumbai** shall have exclusive jurisdiction.

11. Governing Law

This Agreement shall be governed and construed in accordance with the **laws of India**.

12. Entire Agreement

This Agreement, along with the RFP document, the Agency's proposal, and subsequent clarifications, constitutes the entire understanding between IIM Mumbai and the Agency. No amendments shall be valid unless made in writing and signed by both parties.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement on the day and year first above written.

For and on behalf of IIM Mumbai

Signature: _____

Name: _____

Designation: _____

Date: _____

Seal: _____

For and on behalf of the Agency

Signature: _____

Name: _____

Designation: _____

Organization: _____

Date: _____

Seal: _____

Annexure XVI

FORMAT FOR PERFORMANCE SECURITY (BANK GUARANTEE)

(To be executed on Non-Judicial Stamp Paper of appropriate value)

This Bank Guarantee is issued on behalf of _____
("Bidder") in favour of **Indian Institute of Management Mumbai**, having its office at Vihar Lake Road, Powai, Mumbai – 400087 (hereinafter referred to as "IIM Mumbai").

Whereas IIM Mumbai has awarded the contract for the assignment titled:

"Concurrent Evaluation study of PM Vishwakarma Scheme"

to the Bidder, subject to the Bidder furnishing a Performance Security.

We, the _____ (Name of Bank), hereby unconditionally and irrevocably guarantee the payment of ₹ _____ (Rupees _____ only), being 5% of the contract value, to IIM Mumbai on demand, without any protest or demur, for any breach or non-performance by the Bidder.

This guarantee shall remain valid for **six (6) months** from the date of issuance of the Work Order or until completion of all contractual obligations, whichever is later.

Notwithstanding anything contained herein:

1. Our liability shall not exceed ₹ _____.
2. This guarantee shall remain valid until _____.
3. We shall be liable to pay the guaranteed amount within **seven (7) days** of receiving a written demand from IIM Mumbai.

Signed and sealed this _____ day of _____ 2025.

Bank Seal & Authorized Signatory

Name:

Designation:

Bank:

ANNEXURE XVII

RESOURCE DEPLOYMENT PLAN

(To be submitted on Company Letterhead duly stamped and signed)

Please indicate the deployment details of the resources proposed as mentioned in Section 12 for project execution as mentioned below. Indicate only those resources that you had already committed in the Technical Bid

Sr. No.	Role in Project	Name of Individual	No of days presence during onsite project Execution

For and on behalf of the Agency

Signature: _____

Name: _____

Designation: _____

Organization: _____

Date: _____

Seal: _____

Appendix – A

PROJECT TIMELINE AND DELIVERABLE SCHEDULE

The overall duration of the assignment shall be **eight (8) weeks** from the **date of commencement (21st November 2025(Tentative))**.

The following schedule outlines the expected milestones and deliverables:

Phase	Activities	Duration
Phase 1: Preparatory Work	Finalization of scope, survey design, state allocation, and field team onboarding.	3 Days
Phase 2: Pilot Study including Pilot Study Report	Preparation and testing of the survey tool; pilot implementation in Maharashtra, Karnataka, Assam and J&K for validation.	5 Days
Phase 3: Training of Enumerators	Modification of questionnaire if required and training to enumerators.	1 Day
Phase 4: Field Survey	Full-scale data collection across selected States/UTs.	21 Days
Phase 5: Data Analysis & Draft Report	Cleaning, coding, statistical analysis, and preparation of the draft report.	7 Days
Phase 6: Final Report	Revision of report including rework and additional data correction if required.	7 days after receiving the comments on draft report

Note:

All reports shall be submitted in both soft copy (editable format) and hard copy (signed and stamped) versions to IIM Mumbai.

Delays beyond the above schedule shall attract penalties as specified in Section 11.2 of the RFP.

Appendix – B

DATA COLLECTION AND VALIDATION PROTOCOLS

To ensure quality, reliability, and integrity of survey data collected under this assignment, the following standardized protocols shall be followed by all selected agencies:

1. Sampling and Coverage

- The sampling framework shall be provided by IIM Mumbai.
- Beneficiaries shall be selected proportionately across all major occupational categories and geographical regions.
- Minimum 10% back-checks shall be conducted for validation.

2. Enumerator Training

- Enumerators shall undergo training sessions conducted jointly by IIM Mumbai and the agency team.
- Training modules shall cover: digital data collection, ethical interviewing, informed consent, and field verification processes.

3. Data Capture and Monitoring

- Data shall be collected using mobile or tablet-based applications with geo-tagging and time-stamping.
- Real-time dashboards will be used to monitor daily progress.
- Photographic and audio verification may be employed as proof of survey authenticity.

4. Data Cleaning and Quality Assurance

- The agency shall perform consistency checks, remove outliers, and ensure completeness.
- Weekly reports on data quality shall be shared with IIM Mumbai.
- Random audits shall be conducted by IIM Mumbai representatives.

5. Confidentiality and Security

- All digital data shall be stored on secure servers with restricted access.
- Beneficiary identifiers shall be anonymized prior to analysis.
- No data shall be shared with third parties without written approval from IIM Mumbai.

Appendix – C

REPORTING STRUCTURE AND DOCUMENTATION FORMAT

The following formats shall be adopted for periodic and final reporting to maintain uniformity across survey agencies:

1. Reporting Framework

Report Type	Purpose	Frequency / Timing	Contents
Inception Report	To present methodology, sampling plan, and timeline	Within 7 days of Work Order	Methodology, tools, staffing, timeline, risk mitigation plan
Weekly Progress Report	To update field progress	Every Week	No. of surveys completed, data validation summary, issues faced
Interim Evaluation Report	Preliminary analysis	Week 5	Summary of trends, region-wise data tables, interim observations
Final Evaluation Report	Comprehensive findings	Week 8	Full analytical report with conclusions, visuals, and recommendations

2. Report Format

All reports shall follow the below structure:

1. **Executive Summary**
2. **Objectives and Methodology**
3. **Findings and Analysis (Quantitative + Qualitative)**
4. **Challenges and Lessons Learned**
5. **Recommendations and Policy Implications**
6. **Annexures (State-wise data tables, charts, and field photos)**

Reports shall be submitted in:

- **Soft Copy:** Editable Word and Excel files + PDF version
- **Hard Copy:** One printed copy duly signed and stamped

Note:

IIM Mumbai reserves the right to request additional analysis or disaggregated data if required for policymaking or dissemination purposes.

11. PAYMENT PLAN AND PENALTY TERMS**A. Payment Plan**

Payments to the selected agency shall be linked to deliverables and released only after approval of outputs by IIM Mumbai's Project Steering Committee.

All invoices must be accompanied by supporting documents such as progress reports, data submission acknowledgments, and acceptance letters from IIM Mumbai.

Installment No.	Stage / Milestone	Deliverables / Outputs Required	Percentage of Total Contract Value Payable
1	Inception and Mobilization Stage	Submission and approval of Inception Report, including finalized sampling plan, survey instruments, state allocation, quality assurance protocol, and fieldwork schedule.	20%
2	Pilot Testing Completion and submission of Pilot study report.	Successful completion of pilot survey in Maharashtra, Karnataka, Assam and J&K, incorporating feedback, finalization of tools, and readiness for pan-India rollout.	10%
3	Mid-Term Progress	Completion of 50% of the total sample size (5,000 beneficiaries) verified through IIM Mumbai monitoring dashboard, along with interim progress report and data quality summary.	25%
4	Full Data Collection Completion	Completion of 100% data collection (10,000 beneficiaries) and submission of raw and cleaned datasets in Excel/SPSS formats; confirmation through field audit by IIM Mumbai team.	25%
5	Final Report Submission and Acceptance	Submission of the Final Evaluation Report (hard and soft copies), including analysis, recommendations, infographics, and	20%

		regional dissemination presentations; acceptance by IIM Mumbai.	
--	--	--	--

Payment Conditions:

1. Payments will be released only after submission of complete deliverables for each stage and upon written approval by IIM Mumbai.
2. All payments shall be made through electronic transfer within 30 working days of acceptance of deliverables and receipt of invoice.
3. Applicable TDS/GST deductions shall be made as per prevailing government norms.
4. No advance payment shall be made under this assignment.
5. Any discrepancy or shortfall identified during review must be rectified before release of the subsequent installment.

B. Penalty Terms

1. Delay Penalty

- Time is of the essence in this project. In the event of delay in completion of any milestone or deliverable beyond the agreed schedule without prior approval from IIM Mumbai, a penalty at the rate of 5% of the total contract value per week of delay shall be imposed.
- If the delay exceeds five (5) weeks, IIM Mumbai reserves the right to terminate the contract and forfeit the performance security.

2. Data Quality Penalty

If at any stage the data submitted by the agency is found to be incomplete, inconsistent, or unreliable, the agency shall be required to recollect or correct data at its own cost within a stipulated period.

3. Non-Compliance with Reporting Obligations

- Non-submission of weekly progress updates or poor responsiveness to IIM Mumbai's data verification requests may lead to a penalty of 0.5% of contract value per instance, subject to cumulative limit of 2%.

4. Termination Clause

IIM Mumbai reserves the right to terminate the Agreement under any of the following conditions:

6. Default or breach in the performance of obligations by the agency.
7. Delay in deliverables exceeding four weeks beyond the approved timeline.
8. Submission of false or misleading information during the bidding or execution stage.
9. Misconduct, negligence, or fraud on the part of the agency or its representatives.
10. Continuous non-performance of 5 weeks will lead to termination of contract.

In such cases, IIM Mumbai may terminate the contract after giving a written notice of 7 working days, and the agency shall not be entitled to any compensation or claim.

The decision of IIM Mumbai in this regard shall be final.

5. Performance Security

- The selected agency shall furnish a Performance Security equivalent to 10% of the total contract value in the form of a Bank Guarantee from a scheduled or nationalized bank, valid for a period extending three months beyond the contract completion date at the time of signing of agreement.
- The Performance Security shall be released only after satisfactory completion of all deliverables and acceptance of the final report by IIM Mumbai.
- The Performance Security is liable to be forfeited in the event of non-performance, breach of contract terms, or withdrawal from the assignment without due authorization.

6. Recovery Mechanism

All penalties, if applicable, shall be deducted from the immediate next payment due to the agency. In case the payable amount is insufficient, the same shall be recovered from the performance security or any other dues owed to the agency.