

Engagement of Professional Research Agency for Conducting Comprehensive  
Market Research Study Covering B2B and B2C Segments

**Request for Expression of Interest (REOI)**

for

Engagement of Professional Research  
Agency for Conducting Comprehensive  
Market Research Study Covering B2B and  
B2C Segments

for

**The Department of the Posts**  
Dak Bhawan, Department of Posts,  
Sansad Marg,  
New Delhi - 110001

# Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

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## **Part I: REOI Process**

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## **Section I: Request for Expression of Interest (REOI)**

### **1. Invitation**

The President of India, through DDG (Philately & Marketing) in Department of Posts Ministry of Communications, Government of India (hereinafter referred to as 'the Department of Posts (DoP)' respectively) invites Expression of Interest (hereinafter referred as the 'EOIs') from eligible and qualified Indian organizations for shortlisting of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments as described in 'Part II: Scheduled of Requirements' (hereinafter referred to as 'the Services'). Interested Agency(s) should provide sufficient and relevant information demonstrating that they meet the specified eligibility criteria and have the required qualifications to be shortlisted for providing the Services. This Request for Expression of Interest (REOI) document, reference number, 1-4/2021-MD, details the process of such shortlisting. As part of this procurement process, a Request for Proposals (RFP) for selecting the Agency(s) shall be subsequently issued only to such shortlisted Agency/Agencies.

### **2. Instructions for EOI**

#### **2.1. Governing Language and Law**

- a) The EOI submitted by the Agency(s) and all subsequent correspondence and documents relating to the EOI exchanged between the Agency(s) and the DoP should be written in the language specified in Section II: Appendix (in English). However, the language of any printed literature furnished by a Agency(s) in connection with its EOI may be written in any other language, provided a certified translation accompanies the same in the EOI language. For interpretation of the EOI, translation in the language of the EOI shall prevail.
- b) The REOI process shall be subject to the laws of the Union of India and the exclusive jurisdiction of courts relevant to the address of the EOI Inviting Authority.

#### **2.2. Acronyms**

The following Acronyms have been used in this REOI document:

<b>Acronym</b>	<b>Definition</b>	<b>Acronym</b>	<b>Definition</b>
DoP	Department of Posts	EOI	Expression of Interest

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REOI	Request for Expression of Interest	RFP	Request for Proposals
DPR	Detailed Project Report	TOR	Terms of Reference
TIA	Tender Inviting Authority	LOI	Letter of Intent
DA	Documents Attached	LLP	Limited Liability Partnership
DPIIT	Department of Promotion of Industry and Internal Trade		

## 2.3. The Contents of the REOI document

This REOI document provides the relevant information and instructions to assist the prospective **Agency(s)** in preparing and submitting EOIs. It also includes the mode and procedure for receipt, opening, and evaluation of EOIs and short-listing of **Agency(s)**. The REOI document consists of the following parts.

### Part I: REOI process

- 1) Section I: Request for Expression of Interest (REOI)
- 2) Section II: Appendix
- 3) Section III: Qualification and Evaluation Criteria

### Part II: Schedule of Requirements

- 1) Section IV: Terms of Reference

### Part III: EOI Submission Formats

- 1) Form 1: EOI Form (Covering Letter)
- 2) Form 1.1: **Agency(s)** Information
- 3) Form 1.2: Eligibility Declarations
- 4) Form 2: Qualification Criteria – Compliance
- 5) Form 2.1: Performance Capabilities
- 6) Form 2.2: Financial Capabilities Statements
- 7) Form 2.2.1: Financial Statement
- 8) Form 2.2.2: Average Annual Turnover
- 9) Form 3: Checklist for **Agency(s)**
- 10) Other Annexure:
- 11) Annexure1: Authorization to Attend Pre-EOI Conference

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12) Annexure 2: Code of Integrity

## **2.3.1. Section II: Appendix**

Variable parameters and information related to this specific REOI process are summarized in the appendix.

## **2.3.2. Section III: Qualification Criteria**

This section lays down the Qualifying Criteria for short-listing the **Agency(s)**. The **Agency(s)** must have requisite experience with assignments similar in nature in general and specific sectors relevant to the subject assignment.

## **2.3.3. Section IV: Terms of Reference (TOR)**

‘Section IV: Terms of Reference (TOR)’ describes the background, purpose / objectives, description / scope, deliverables / outcomes, and timelines of the project (hereinafter called the ‘Service’).

## **2.3.4. EOI Formats for submission (To be filled, digitally signed, and uploaded by the **Agency(s)**)**

The **Agency(s)** must fill, digitally sign and upload the EOI in the Formats given in Part III: ‘EOI Submission Formats’.

## **2.4. Corrigenda/ Addenda to REOI document**

1. The Department of Posts (DoP) may update, amend, modify, or supplement the information; assessment or assumptions contained in the REOI document by issuing corrigendum/da and addendum/da thus issued shall be considered a part of the REOI document.
2. If considered necessary, the Department of Posts (DoP) may suitably extend the EOI submission deadline to give reasonable time to the prospective **Agency(s)** to take such corrigendum / addendum into account in preparing their EOI. After the DoP makes such modifications, any **Agency(s)** who has

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submitted EOI shall have the opportunity to either withdraw EOI or re-submit EOI superseding the original EOI within the extended time of submission.

3. The DoP may extend the deadline for the EOI submission by issuing an amendment. In such a case, all rights and obligations of the DoP and the Agency(s) previously subject to the original deadline shall then be subject to the new deadline for the EOI submission.

### **3. Department of Posts - Right to Reject any or all EOIs.**

The issue of the REOI document does not imply that the DoP is bound to shortlist Agency(s). The DoP reserves its right to accept or reject any or all EOIs, abandon/ bypass/ cancel the REOI process and issue another REOI for the same or similar Services before or after shortlisting Agency(s). It would have no liability to the affected Agency(s) or Agency(s) or any obligation to inform the affected Agency(s) or Agency(s) of the grounds for such action(s).

### **4. Participation in REOI – Eligibility Criteria**

#### **4.1. Eligibility Criteria**

Subject to other provisions in the REOI document, participation in this shortlisting process is open to all Agency(s) who fulfil the 'Eligibility' and 'qualification' (mentioned in Section III) criteria. Agency(s) should meet the following eligibility criteria as of the date of their EOI submission and should continue to meet these until the subsequent RFP process and award of contract. Agency(s) shall be required to demonstrate fulfilment of the Eligibility Criteria in Form 1.2 (Eligibility Declarations). Agency(s) unless otherwise stipulated in Section II: Appendix:

1. must be:
  - a. a private entity (a Consulting Company/ LLP /Partnership firm/ Society registered under an applicable Act in India), or a public Entity (Government-owned enterprise or institution), or otherwise stipulated in Section II: Appendix.
  - b. a consultancy services provider with valid registration regarding GSTIN, PAN, EPF, ESI, Labour, or equivalent registration certificate issued by the concerned authority/government as applicable to the subject Services.
2. must:

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- a) not be insolvent, in receivership, bankrupt or being wound up, not have its affairs administered by a court or a judicial officer, not have its business activities suspended and must not be the subject of legal proceedings for any of aforesaid reasons.
- b) (Including their affiliates, subsidiaries, or contractors/ sub-Agency(s) for any part of the contract):
- i Not stand declared convicted/ ineligible/ blacklisted/ banned/ debarred by the DoP, or its Ministry/ Department from participation in its procurement processes within three years preceding the last date of EOI submission; and/ or
  - ii Not be convicted or stand declared ineligible/ suspended/ blacklisted/ banned/ debarred by appropriate agencies of the Government of India from participation in procurement processes of all its entities within three years preceding the last date of EOI submission for:
    - offences involving moral turpitude in business dealings under the Prevention of Corruption Act, 1988 or any other law; and/or
    - offences under the Indian Penal Code or any other law for causing any loss of life/ limbs/ property or endangering Public Health during the execution of a public procurement contract and/ or
    - suspected to be or of doubtful loyalty to the Country or a National Security risk as determined by appropriate agencies of the Government of India.
  - iii Not have changed its name or created a new “Allied Entity”, consequent to having declared ineligible/ suspended/ blacklisted/ banned/ debarred / convicted as above.
- c) Not have an association (as a Agency(s)/ partner/ director/ employee in any capacity)
- i of any retired employee (of Gazetted Rank) or any retired Gazetted Officer of the Central or State Government or its Public Sector Undertakings, if such a retired person has not completed the one-year cooling-off period (or any other period stipulated by their erstwhile Employer) after his retirement. However, this shall not apply if such employees/ officers have obtained a waiver of the cooling-off period from their former organization.

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- ii of the near relations of executives of DoP involved/ likely to be involved in this procurement process.
  - d) Not have a conflict of interest (as defined in clause 4.4), which substantially affects fair competition. No attempt should be made to induce any other **Agency(s)** to submit or not to submit an EOI to restrict competition.
  - e) must fulfil any other additional eligibility condition, if any, as may be prescribed in the REOI document.
3. must provide such evidence of their continued eligibility to the DoP, if requested.

### **4.2. Sub-Agency(s)/ Sub-contracting**

**Agency(s)** may propose to associate Sub-**Agency(s)** for specialized parts of the Services provided their names and details are clearly stated in the EOI. Such Sub-**Agency(s)** should not circumvent the eligibility condition laid down above. The value of such sub-contracts shall not exceed the limit specified (25% of the contract price) in Section II: Appendix. Nevertheless, the **Agency(s)** shall solely remain responsible for subcontracted portions of the Services. Key and non-key personnel, whether full-time employees or on contract, shall not be considered sub-**Agency(s)**. Procurement of incidental goods, equipment hires, or labor engagement shall not be treated as sub-contracting.

### **4.3. Joint Venture/ Consortium (JV/C)**

No consortium or Joint Venture of firms is eligible for participation in the REOI.

### **4.4. Conflict of Interest**

1. Any **Agency(s)** with a conflict of interest that substantially affects fair competition shall not be eligible to participate in this procurement process. EOIs found to have a conflict of interest shall be rejected as non-responsive. **Agency(s)** shall be required to declare the absence of such conflict of interest in Form 1.2 - Eligibility Declarations. A **Agency(s)** in this procurement process shall be considered to have a conflict of interest if the **Agency(s)**:
  - a. directly or indirectly controls, is controlled by or is under common control with another **Agency(s)**; or
  - b. receives or has received any direct or indirect subsidy/ financial stake from another **Agency(s)**; or

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- c. has the same correspondence address or same legal representative/ agent as another Agency(s) for purposes of this EOI; or
- d. has a relationship with another Agency(s), directly or through common third parties, which puts it in a position to have access to information about or influence the EOI of another Agency(s); or
- e. would be providing goods, works, or non-consulting services resulting from or directly related to consulting services that it provided (or were provided by any affiliate that directly or indirectly controls, is controlled by, or is under common control with that firm) for the procurement planning (inter-alia preparation of feasibility/ cost estimates/ Detailed Project Report (DPR), design/ technical specifications, terms of reference (TOR)/ Activity Schedule/ schedule of requirements or the EOI/ RFP Document etc.) of this procurement process; or
- f. has a close business or family relationship with a staff of the DoP who:
  - i. are directly or indirectly involved in the preparation of the REOI document or Terms of Reference of the procurement process and/or the evaluation in EOI and/ or RFP process; or
  - ii. would be involved in the implementation or supervision of the resulting contract.

Any conflict stemming from such a relationship must be reported and resolved in a manner acceptable to the DoP throughout the REOI and RFP processes and execution of the contract.

2. The Agency(s) shall furnish information on commissions and gratuities, if any, paid or to be paid to agents or any other party relating to this REOI and RFP process.

### 4.5. Eligibility of Agency(s) from Restricted countries

#### 4.5.1. Restrictions based on Reciprocity

Entities from countries (if so, identified in Section II: Appendix) as not allowing Indian companies to participate in their Government procurement, shall not be allowed to participate (directly or as a sub-contractor or as a member of a JV/C) on a reciprocal basis in this REOI process under the “Public Procurement (Preference to Make in India) Order 2017<sup>1</sup>” (MII – para 10 -d) of Department for Promotion of Industry and Internal Trade, (DPIIT). Agency(s) must apprise themselves of the latest version of this order.

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<sup>1</sup> No. P-45021/2/2017-PP (BE-II) dated 16th September 2020

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## 4.5.2. Restrictions based on Land Borders

Orders<sup>1</sup> issued by the Government of India (Ministry of Finance, Department of Expenditure, Public Procurement Division) restricting procurement from Agency(s) from certain countries that share a land border with India shall apply to this procurement. Agency(s) must apprise themselves of the latest version of this order. Any Agency(s) from a country that shares a land border with India<sup>2</sup>, excluding countries to which the Government of India has extended lines of credit or in which the Government of India is engaged in development projects (as listed on the website of the Ministry of External Affairs<sup>3</sup>), – hereinafter called ‘Restricted Countries’, shall be eligible to participate in this REOI, only if the Agency(s) is registered<sup>4</sup> with the Registration Committee constituted by the Department for Promotion of Industry and Internal Trade (DPIIT). Agency(s) shall enclose the certificate in Form 1 - EOI Form.

## 4.6. Purchase Preference Policies of the Government

### 4.6.1 Relaxation in Prior Turnover and Experience to Startups

1. In this REOI process, under the policy of the Government<sup>1</sup>, the DoP reserves its right to relax the condition of prior turnover and prior experience for Startups (as defined by the Department for Promotion of Industry and Internal Trade) subject to meeting of quality & technical specifications. The quality and technical parameters shall not be diluted. The decision of the DoP in this regard shall be final.
2. Agency(s) with Startup status can claim relaxation for prior turnover and experience mentioned in Section III by providing a valid ‘Certificate of Recognition’ issued by the Department for Promotion of Industry and Internal Trade (DPIIT), Ministry of Commerce & Industry, Govt. of India. Such relaxation shall be given only for the specific domain of goods/ services they are registered for.

## 5. Downloading REOI document, Clarifications and Pre-EOI Conference

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<sup>1</sup> Order No.6/18/2019-PPD dated 23rd July 2020 and DoE (MoF) order No.F.7/10/2021-PPD (1) dated 23.02.2023

<sup>2</sup> <https://mea.gov.in/india-and-neighbours.htm>

<sup>3</sup> <http://meadashboard.gov.in/indicators/92>

<sup>4</sup> <https://dipp.gov.in/sites/default/files/Revised-Application-Format-for-Registration-of-Consultants-15Oct2020.pdf>

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## 5.1. Availability and Downloading of the REOI Document

The Request for Expression of Interest shall be published on the CPP portal (<https://eprocure.gov.in>). It shall be available for download after the date and time of the start of availability till the deadline for availability as mentioned in Section II: Appendix. Unless otherwise stipulated in Section II: Appendix, the downloaded Request for Expression of Interest is free of cost. If the DoP happens to be closed on the deadline for submitting the EOIs as specified above, this deadline shall *not* be extended. Any query/clarification regarding downloading Request for Expression of Interest and uploading EOIs on the portal may be addressed to their Help Desk (contact details given in Section II: Appendix).

## 5.2. Clarifications

Participants may seek clarification of the EOI document through the CPP portal before the date and time prescribed in Section II: Appendix. This deadline shall not be extended in case of any intervening holidays. No other means of submission of queries shall be entertained.

Rule 173 (i) of GFR 2017

## 5.3. Pre-EOI Conference

1. If a Pre-EOI conference is stipulated in Section II: Appendix, prospective **Agency(s)** interested in participating in this REOI may attend a Pre-EOI conference to clarify the conditions of the REOI process at the venue, date and time specified therein. Participation in the Pre-EOI conference is not mandatory but is restricted to prospective **Agency(s)** who have registered for the Pre-EOI conference.
2. The date and time by which the written queries for the Pre-EOI must reach the authority and the last date for registration for participation in the Pre-EOI conference are also mentioned in Section II: Appendix. If the dates are not mentioned, such date and time shall be seven days before the date and time of the Pre-EOI conference.

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3. Delegates participating in the Pre-EOI conference must provide a photo identity and an authorization letter as per Format 1: "Authorization to Attend Pre-EOI Conference" from their organization; else, they shall not be allowed to participate. The Pre-EOI conference may also be held online at the discretion of the Procuring Entity.
4. After the Pre-EOI conference, minutes of the Pre-EOI conference (including the questions asked in writing and those asked during the meeting (without identifying the source) and the responses given, together with any responses prepared after the meeting, shall be published on the Department's Portal (<https://www.indiapost.gov.in>) within seven days from the Pre-EOI conference. If required, a clarification letter and corrigendum to the REOI document shall be issued, containing amendments, if any, of various provisions (including the TOR, if required) of the REOI document, which shall be deemed part of the REOI document. As per clause 2.4 above, DoP may suitably extend by at least three days the deadline for the EOI submission to give reasonable time to the prospective Agency(s) to consider such clarifications in preparing their EOIs.

### 6. Preparation of EOIs

#### 6.1. EOI Submission Formats

The Agency(s) must fill and submit the EOI in the Formats in Part III - 'EOI Submission Formats'. EOI by the Agency(s) shall include inter-alia duly signed or digitally signed scanned copies of the original documents in pdf format.

#### 6.2. EOI Validity

- a) Unless specified to the contrary in Section II: Appendix, EOIs shall remain valid for a period not less than 90 (ninety) days from the last date for the EOI submission stipulated in Section II: Appendix. An EOI valid for a shorter period shall be rejected as nonresponsive.
- b) In case the day upto which the EOIs are to remain valid falls on/ subsequently declared a holiday or closed day for the DoP, the EOI validity shall automatically be deemed to be extended upto the next working day.
- c) In exceptional circumstances, before the expiry of the original time limit, the DoP may request the Agency(s) to extend the validity period for a specified additional period. The request and the Agency(s) responses shall be made in writing or electronically. Agency(s) may agree to or reject the request. Agency(s) who has

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agreed to the DoP request for extension of EOI validity, however, in no case he shall be permitted to modify his/ her EOI.

## 7. Signing and uploading of EOIs

### 7.1. Relationship between Agency(s) and CPP portal

The DoP is neither a party nor a principal in the relationship between the Agency(s) and the organization hosting the CPP portal (hereinafter called the portal). The Agency(s) must comply with the rules, conditions, regulations, procedures, and implied conditions/ agreements of the CPP portal, including registration, compatible Digital Signature Certificate (DSC) etc. The Agency(s) shall settle clarifications and disputes, if any, regarding the portal directly with them. In case of conflict between provisions of the portal with the REOI document, provisions of the portal shall prevail. The Agency(s) may study the resources provided by the Portal for the Agency(s).

### 7.2. Signing of EOI

The Agency(s) digitally signing (DSC/e-sign) the EOI, or any other connected documents should submit an authenticated copy of the document(s), which authorizes the signatory to commit and submit EOIs on behalf of the Agency(s) along with Form 1.1: Agency(s) Information.

### 7.3. Submission/ uploading of EOIs

#### 7.3.1 Submission/ Uploading to the Portal

- (a) EOIs must be uploaded on the CPP Portal mentioned in Section II: Appendix until the submission deadline. If the office happens to be closed on the deadline to submit the EOIs as specified above, this deadline shall not be extended. Manual EOIs shall neither be made available nor accepted for submission. EOI submitted through modalities other than those stipulated in Section II: Appendix shall be liable to be rejected as nonresponsive.
- (b) In the case of downloaded documents, Agency(s) must not make any changes to the contents of the documents while uploading, except for filling in the required information. Otherwise, the EOI shall be rejected as non-responsive. Uploaded pdf documents should not be password protected. Agency(s) should ensure the clarity/ legibility of the scanned documents uploaded by them.
- (c) The date and time of the CPP portal server clock, which is also displayed on the dashboard of the Agency(s), shall be taken as the reference time for deciding

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the closing time of EOI submission. **Agency(s)** is advised to ensure they submit their EOI within the deadline of EOI submission, taking the server clock as a reference, failing which the portal shall not accept the EOIs. No request on the account that the server clock was not showing the correct time and that a particular **Agency(s)** could not submit their EOI because of this shall be entertained. Failure or defects on the internet or heavy traffic at the server shall not be accepted as a reason for a complaint. The DoP shall not be responsible for any failure, malfunction or breakdown of the electronic system used during the eTender process.

- (d) Only one copy of the EOI can be uploaded, and the **Agency(s)** shall digitally sign all statements, documents, and certificates uploaded by him, owning sole and complete responsibility for their correctness/ authenticity as per the IT Act 2000 as amended from time to time.
- (e) All EOIs uploaded by **Agency(s)** to the portal shall get automatically encrypted. The encrypted EOI can only be decrypted/ opened by the authorized persons on or after the due date and time. The **Agency(s)** should ensure the correctness of the EOI before uploading and take a printout of the system generated submission summary to confirm successful EOI upload.

### **7.3.2 Implied acceptance of procedures by **Agency(s)****

Submission of EOI in response to the REOI document is deemed to be acceptance of the procedures and conditions of the CPP Portal and REOI document.

### **7.3.3 Responsibility of the **Agency(s)** to declare all changes.**

The **Agency(s)** must advise the DoP immediately in writing of any material change to the information provided in their EOI submission, including any substantial change in their ownership, eligibility, or financial or performance capacity. For empaneling **Agency(s)**, this requirement applies until a contract is awarded by issuing letter of intent (LOI).

### **7.3.4 Modification & Resubmission**

Once submitted in CPP portal, the **Agency(s)** cannot view or modify their EOI since it is locked by encryption. However, resubmission of the EOI by the **Agency(s)** for any number of times superseding earlier EOI(s) is allowed upto the submission deadline by following procedures prescribed by the portal. Resubmission of an EOI shall require uploading all documents afresh. The system shall consider only the last EOI submitted.

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## **7.3.5 Withdrawal**

The **Agency(s)** may withdraw its EOI before the last date of submission by following procedures prescribed by the portal and it shall be marked as withdrawn and shall not get opened during the EOI opening. No EOI should be withdrawn after the last date of submission and before its validity period expires.

## **8. EOI Opening**

EOIs received shall be opened online on or after the specified date and time in Section II: Appendix. If the specified date of EOI opening falls on or is subsequently declared a holiday or closed day for the DoP, the EOIs shall be opened at the appointed time on the next working day.

## **9. Evaluation of EOIs and Shortlisting of **Agency(s)****

### **9.1. General norms**

#### **9.1.1 Evaluation is based only on declared criteria.**

- a) The evaluation shall be based upon scrutinizing and examining all relevant data and details submitted by **Agency(s)** in their EOI and other allied information deemed appropriate by DoP. Evaluation of EOIs shall be based only on the criteria/ conditions included in the REOI document.
- b) Information relating to the evaluation of EOIs, and shortlisting results shall not be disclosed to any participant, or any other persons not officially concerned with such process until the notification of shortlisting is made in accordance with clause 9.2.5 below.
- c) The determination shall not consider the qualifications of other firms, such as the **Agency(s)**'s subsidiaries, parent entities, affiliates, or any other firm(s) different from the **Agency(s)**.

#### **9.1.2 Clarification of EOIs and shortfall documents**

- a) During the evaluation of EOIs, the DoP may, at its discretion, but without any obligation to do so, asks the **Agency(s)** to clarify its EOI by a specified date (or, if not specified, seven days from the date of receipt of such request). The **Agency(s)** should answer the clarification within that specified date. The clarification request and response shall be submitted in writing or electronically. No change in the substance of the EOI shall be sought, offered, or permitted that may grant any undue advantage to such an **Agency(s)**. Any clarifications submitted by a **Agency(s)** regarding its EOI that is not in response to a request by the Purchasing Entity shall not be considered.

## Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

- b) The DoP reserves its right to, but without any obligation to do so, seek any shortfall information/ documents. Provided such information/ documents are historical, which pre-existed at the time of the EOI opening and which have not undergone change since then and do not grant any undue advantage to any Agency(s). There is a provision on the portal for requesting Short-fall documents from the Agency(s). The system allows taking the shortfall documents from Agency(s) only once after the EOI opening.
- c) If the Agency(s) fails to provide satisfactory clarification and/or missing information, its EOI shall be evaluated based on available information and documents.

### 9.1.3 Contacting DoP during the evaluation

From EOI submission to shortlisting of Agency(s), no Agency(s) shall contact the DoP on any matter relating to the submitted EOI. If a Agency(s) needs to contact the DoP relating to this EOI, it should do so only in writing or electronically. Any effort by a Agency(s) to influence the DoP during the REOI process shall be construed as a breach of the Code of Integrity (see clause 11 below), and EOI shall be liable to be rejected as non-responsive in addition to other punitive actions for such a breach as per the REOI document.

## 9.2. Evaluation of EOIs and Short-listing

In evaluating the EOI, conformity to the eligibility and qualification criteria to those in the REOI document is ascertained. Additional factors incorporated in the REOI document shall also be considered as indicated therein.

### 9.2.1. Determining Responsiveness

Only substantively responsive EOIs shall be evaluated for shortlisting. A substantively responsive EOI is complete and conforms to the REOI document's essential terms and conditions. Unless otherwise stipulated in Section II: Appendix, the following are some of the crucial aspects for which an EOI shall be rejected as nonresponsive:

- a) The EOI is not in the prescribed format or is not submitted as per the stipulations in the REOI document.
- b) The Agency(s) not eligible to participate in the EOI as per laid down eligibility criteria;
- c) The EOI validity is shorter than the required period.
- d) The EOI departs from the essential requirements stipulated in the EOI document;

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- e) Non-submission or submission of illegible scanned copies of stipulated documents/declarations, if any
- f) The **Agency(s)** fails to provide and/ or comply with the required information, instructions etc., incorporated in the REOI document or gives evasive information/ reply against any such stipulations.
- g) The **Agency(s)** furnishes wrong and/ or misleading data, statement(s) etc. In such a situation, besides rejecting the EOI as nonresponsive, it is liable to attract other punitive actions under relevant provisions of the REOI document for breach of the Code of Integrity.

### **9.2.2. Evaluation of Eligibility**

DoP shall determine, to its satisfaction, whether the **Agency(s)** are eligible as per Clause 4 above to participate in the REOI process as per submission in 'Form 1.2: Eligibility Declarations. The eligibility evaluation shall be on a "pass" or "fail" basis. A **Agency(s)** must achieve a "pass" on all the criteria to proceed to the next step. A **Agency(s)** not achieving a 'pass' in any of the eligibility criteria shall be rejected as nonresponsive.

### **9.2.3. Evaluation of Qualification Criteria**

DoP shall determine whether the **Agency(s)** are qualified and capable in all respects to be shortlisted to provide the 'Services' (as per clause 2.3.3 above), as per Section III: Qualification Criteria and submission in Forms listed in Part II: 'EOI Submission Formats'. The determination shall not consider the qualifications of other firms, such as the **Agency(s)**'s subsidiaries, parent entities, affiliates, or any other entity different from the **Agency(s)**. The DoP reserves the right to waive minor deviations in the qualification criteria if they do not materially affect the capability of an **Agency(s)** to perform the consultancy services.

### **9.2.4. Verification of Original Documents at EOI Process**

DoP reserves its right to call for verification, originals of all self-certified copies of uploaded documents from the **Agency(s)** during the following RFP Process. If the shortlisted **Agency(s)** fails at that stage to provide such originals or, in case of substantive discrepancies in such documents, it shall be construed as a breach of the Code of Integrity (see clause 11 below). Such proposals shall be liable to be rejected as nonresponsive in addition to other punitive actions for such a breach.

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### 9.2.5. Declaration of Shortlisted Agency(s)

- a) EOIs of Agency(s) that succeed in the above evaluation shall be shortlisted. Provisionally shortlisted Agency(s) will be informed of the condition(s) that must be met before submitting their Proposal in the RFP process. Such shortlisting shall remain valid for a period specified in Section II: Appendix (six months from the date of declaration, if not so specified).
- b) Only shortlisted (including provisionally shortlisted) Agency(s) shall be invited to participate in the following RFP process.
- c) The name and address of the shortlisted Agency(s) (s) shall be published in the portal and notice board/ bulletin/website of the DoP. All Agency(s) shall be advised about shortlisting of their EOIs or otherwise without disclosing the comparative position of their EOIs with that of others. Shortlisted Agency(s) must not advertise or publish the same in any form without the prior written consent of the DoP.
- d) Shortlisting a Agency(s) is an administrative process and does not confer any legal or contractual rights on them. Since original documents/ certificates are not being called for and examined at this stage, all shortlisted shall be conditional upon final verification of such documents/ certificates during the RFP Process.

### 9.3. Publication of RFP following this EOI

The DoP shall publish a Request for Proposal (RFP) addressed exclusively to shortlisted Agency(s) for the following procurement process through the eProcurement portal. DoP / the Portal may issue notifications/ alerts to such Agency(s) but without any liability. Such Agency(s) shall be responsible for being on the lookout for the RFP on the portal. While publishing the RFP, the DoP reserves its right to elaborate further on the brief overview of the proposed procurement/scope of work, qualification Criteria and other terms & conditions without vitiating the shortlisting process. Shortlisted Agency(s) shall have no claim in this regard.

## 10. Grievance Redressal/ Complaint Procedure

- a) Agency(s) have the right to submit a complaint or seek de-briefing if he is not shortlisted in this REOI process, in writing or electronically, within ten days of the declaration of EOI evaluation results. The complaint shall be addressed to the Head of Procurement.

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- b) Within five working days of receipt of the complaint, the Tender Inviting Authority shall acknowledge the receipt in writing to the complainant, indicating that it has been received. The response shall be sent in due course after a detailed examination.
- c) The Tender Inviting Authority shall convey the final decision to the complainant within 15 days of receiving the complaint. No response shall be given regarding the confidential process of evaluating EOIs before the results are notified, although the complaint shall be kept in view during such a process. However, no response shall be given regarding the following topics explicitly excluded from such complaint process:
  - i. Only a **Agency(s)** who has participated in the REOI process and has not been shortlisted can make such a representation. Complaints regarding shortlisting or exclusion of other **Agency(s)** shall not be entertained.
  - ii. No third-party information (EOIs, eligibility/ qualification) shall be sought and must not be included in the response.
- d) Following decisions of DoP shall not be subject to review:
  - i. Determination of the need for procurement.
  - ii. Complaints against eligibility and qualification criteria except under the premise that they are either vague or too specific to limit competition.
  - iii. Choice of the selection procedure.
  - iv. Provisions limiting the participation of **Agency(s)** in the REOI process, in terms of policies of the Government.
  - v. Provisions regarding purchase preferences to specific categories of **Agency(s)** in terms of policies of the Government
  - vi. Cancellation of the REOI process except where it is intended to subsequently re-tender the same Services.

### **11. Code of Integrity in Public Procurement, Misdemeanours & Penalties:**

Code of Integrity<sup>1</sup> and penalties for violating the Government of India, Ministry of Finance, Department of Expenditure shall apply to this REOI process. DoP, suppliers, contractors, and **Agency(s)** should observe the highest standard of integrity and not indulge in prohibited practices or other misdemeanours, either directly or indirectly,

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<sup>1</sup> as detailed in Rule 175 and Rule 151 of the General Financial Rules, 2017 (and its amendments, if any)

## Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

during the entire procurement Process (including this EOI) or the execution of resultant contracts.

*Note: For further details, please refer to appended Section II: Appendix.*

Digitally Signed by

**DDG (Philately & Marketing)**  
**Marketing Division**  
**Department of Posts**

Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

**Section II: Appendix**

Expression of Interest Document No. 1-4/2021-MD; Tender Title: Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

<b>1. Basic REOI Details</b>			
REOI Title	Request for Expression of Interest for Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments		
Name of Project	Consultancy for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments		
REOI Reference Number	1-4/2021-MD	Tender ID	<b>xxxx</b>
REOI Type	Expression of Interest	REOI Category	Services
No. of Covers	Single Cover	Product Category	Consultancy
Domestic/ Global Procurement	Domestic Procurement	Organization:	Department of Posts, Ministry of Communications
Organization	The Department of Posts	Authority on whose behalf EOI is invited	President of India
Through the	DDG (Philately & Marketing) Marketing Division Department of Posts	Tender Inviting Authority (TIA)	DDG (Philately & Marketing) Marketing Division Department of Posts
Address	DDG (Philately & Marketing) Marketing Division Dak Bhawan, Department of Posts, Sansad Marg, New Delhi - 110001		
<b>2. Critical Dates (Clause 5;6;7 &amp;8)</b>			
Published Date	09.04.2026, 1700 hrs	EOI Validity (Days from the	90 days

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		date of EOI opening) – REOI Clause 6.2	
Document Download Start Date & Time	09.04.2026, 1700 hrs	Document Download End Date & Time	30.04.2026 16:00 hrs
Clarification Start Date & Time	09.04.2026, 1700 hrs	Clarification End Date & Time	22.04.2026 17:00 hrs
EOI Submission Start Date & Time	09.04.2026, 1700 hrs	EOI Submission Closing Date & Time	30.04.2026 18:00 hrs
EOI Opening Date & Time	04.05.2026 16:01 hrs		

**3. Eligibility and Qualification Criteria (Clauses 2.3.2, 4, 9.2 and Section III)**

Category of eligible Agency(s)	As defined in <b>Section III</b> .
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**4. Obtaining the REOI document and clarifications (Clauses 5 & 7)**

CPP Portal and DoP Portal/ Help Desk	<a href="https://eprocure.gov.in/">https://eprocure.gov.in/</a>	<a href="https://www.indiapost.gov.in/">https://www.indiapost.gov.in/</a>
Cost of REOI document (INR)	Nil	
Office/ Contact Person/email for clarifications	DDG (Philately & Marketing) Marketing Division Dak Bhawan, Department of Posts, Sansad Marg, New Delhi – 110001 Tel: Email: Mktdiv.dop@gmail.com	

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<b>5. Pre-EOI Conference (Clause 5.3)</b>			
Is a Pre-EOI Conference proposed to be held?	Yes		
Place, time, and date of the Pre- EOI Conference	TBD		
Place, time, and date before which Written queries for the Pre-EOI conference must be received	Dak Bhawan, New Delhi 21-04-2026, 11:00 AM		
Place, time, and date before which registration of participants for the Pre-EOI conference must be received	Dak Bhawan, New Delhi 20-04-2026, 11:00 AM		
<b>6.0 Preparation and Submission and Opening of EOIs (Clauses 6, 7 &amp; 8)</b>			
EOIs to be Addressed to	DDG (Philately & Marketing) Marketing Division Dak Bhawan, Department of Posts, Sansad Marg, New Delhi - 110001 Tel: Email: <a href="mailto:Mktdiv.dop@gmail.com">Mktdiv.dop@gmail.com</a>		
Language of Submission	English	EOI Validity	90 days from Bid opening date
EOI Opening Place	On CPP portal ( <a href="https://eprocure.gov.in">https://eprocure.gov.in</a> )		

<b>6.0 About RFP that would follow – clause 9.3</b>	
RFP to be issued	Limited to shortlisted <b>Agency(s)</b> from this EOI
Form of Contract	<b>Time-based (inputs admeasurement)/ Lumpsum</b>
Selection Method	Quality & Cost Based Selection (QCBS)
Bid Security Requirements	Yes – shall be detailed in the RFP
Performance	Yes – shall be detailed in the RFP

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Security	
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**Section III - Qualification Criteria**

#	Section	Minimum Requirement	Supporting Document(s)
<b>A — Organisational Standing</b>			
<b>A1</b>	<b>Legal Registration</b>	Agency must be a legally registered entity in India — Consulting Company, LLP, Partnership Firm, or Society registered under an applicable Act. Must hold valid GSTIN, PAN, EPF / ESI registrations as applicable to the Services.	<i>Certificate of Incorporation / Registration; GSTIN &amp; PAN certificates; EPF/ESI registration</i>
<b>A2</b>	<b>Good Standing</b>	Agency must not be blacklisted, debarred, insolvent, or under liquidation by any Government of India Ministry / Department within 3 years preceding the last date of EOI submission.	<i>Self-declaration</i>
<b>A3</b>	<b>No Conflict of Interest</b>	Agency must not have a conflict of interest that substantially affects fair competition as defined in Clause 4.4 of the REOI. No common control with another bidder; no direct/indirect subsidy received from DoP.	<i>Conflict of interest declaration</i>
<b>B — Experience &amp; Track Record</b>			
<b>B1</b>	<b>Years in Market Research</b>	Agency must have a minimum of 10 years of continuous experience conducting market research studies (quantitative and qualitative) for government bodies, PSUs, or large private-sector organisations.	<i>Company profile; Certificate of Incorporation showing establishment date; Form 1.1A</i>

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<b>B2</b>	<b>Similar Assignments (Value-Based)</b>	<p>Agency must demonstrate at least one of the following in the last 5 years:</p> <ul style="list-style-type: none"> <li>• One similar project (nationwide B2B/B2C consumer or market research) valued <math>\geq</math> ₹1 Cr, OR</li> <li>• Two such projects, each valued <math>\geq</math> ₹0.70 Cr, OR</li> <li>• Four such projects, each valued <math>\geq</math> ₹0.50 Cr.</li> </ul> <p>'Similar' means primary research covering multiple states and at least one of: financial services, postal/logistics, telecom, e-commerce, or government services.</p>	<i>Work orders + completion certificates issued from client head offices; Form 2 Sub-Point 1</i>
<b>B3</b>	<b>Government / PSU Research Experience</b>	<p>Agency must have completed at least one assignment in past 3 year for a Central/State Government Ministry, Department, PSU, or regulated financial institution involving primary data collection and customer satisfaction measurement.</p>	<i>Client certificate specifying organisation name, scope, and contract value</i>
<b>B4</b>	<b>Pan-India Fieldwork Capability</b>	<p>Agency must demonstrate prior experience conducting primary surveys across a minimum of 15 States / UTs, with coverage of rural, semi-urban, and urban geographies. Evidence of own or partnered field investigation network required.</p>	<i>Project scope in completion certificate or work order; field network overview / methodology note</i>
<b>B5</b>	<b>Digital Platform / UX Audit Experience</b>	<p>Agency must have conducted at least one expert usability audit or digital customer-experience assessment of a web portal or mobile application as part of a prior research or consulting assignment.</p>	<i>Relevant project description + client certificate; or dedicated section in company profile</i>

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<b>C — Financial Capability</b>			
<b>C1</b>	<b>Average Annual Turnover</b>	Agency must have a minimum average annual turnover / income of Rs 4.00 Crore over the last 3 financial years ending 31 March 2025, derived from market research, consulting, or related professional services.	<i>Audited financial statements OR CA-certified turnover certificate; Form 2 Sub-Point 2</i>
<b>C2</b>	<b>Positive Net Worth</b>	Agency must have a positive net worth in the most recently audited balance sheet. Agencies with negative net worth at end of the last financial year are not eligible.	<i>Audited balance sheet for FY 2024–25 OR CA certificate confirming positive net worth</i>
<b>D — Technical &amp; Methodological Capability</b>			
<b>D1</b>	<b>Research Methodology Framework</b>	Agency must submit a brief methodology note (3–5 pages) demonstrating capability in: (a) Designing mixed-method research frameworks (b) Scientific probability and purposive sampling (c) CAPI / CATI / hybrid data collection (d) Statistical analysis tools (SPSS, R, Python, or equivalent)	<i>Methodology note — submitted with Form 2</i>
<b>D2</b>	<b>Quality Assurance Processes</b>	Agency must describe its data quality monitoring, field supervision, and back-check procedures. ISO 20252 certification or equivalent quality management system is preferred but not mandatory.	<i>QA process note; ISO 20252 / equivalent certificate (if held)</i>
<b>E — Key Personnel</b>			
<b>E1</b>	<b>Project Director</b>	Must hold a postgraduate degree (MBA / MA / M.Sc. in relevant field) with a minimum of 10 years of experience managing	<i>CV; educational certificates; project reference list</i>

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		large-scale primary research projects.	
<b>E2</b>	<b>Lead Research Analyst</b>	Must hold a postgraduate degree in Statistics, Market Research, or Social Sciences with a minimum of 7 years of experience in quantitative and qualitative research design, fieldwork management, and data analysis.	<i>CV; educational certificates</i>
<b>E3</b>	<b>UX / Digital Specialist</b>	At least one proposed team member must have demonstrable experience in UX research or digital usability assessments, with at least 3 years of relevant experience, to lead the digital platform audit component as required under TOR Section iv.	<i>CV; UX project portfolio or brief description of relevant work</i>
<b>E4</b>	<b>Field Operations Manager</b>	Dedicated Field Operations Manager with at least 5 years of experience managing pan-India field data collection, including rural survey operations across multiple States / UTs.	<i>CV</i>

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**Part –II: Schedule of Requirements**

# Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

## **Section IV: Terms of Reference (TOR)**

REOI document No. 1-4/2021-MD; Tender Title: Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

(Ref REOI Clause 2.3)

### **Terms of Reference**

#### **1. Background**

The Department of Posts (DoP), Government of India, provides a wide range of postal, financial, insurance and citizen-centric services across the country through an extensive network of post offices.

The Department of Posts, Government of India, proposes to engage a suitable and experienced research agency through this Request for Proposal (RFP) to undertake a comprehensive research to understand the consumer perceptions and market sizing across retail consumers, business users and auditing of digital service interfaces associated with India Post. The purpose of this engagement is to develop a structured and evidence-based market intelligence framework that will enable the Department to obtain a deeper understanding of customer perception, service usage patterns, and emerging market dynamics across its major service verticals. The study is expected to generate actionable insights relating to growth opportunities, perception gaps in the market, barriers affecting service adoption, and key priorities influencing customer experience across each of the 6 verticals. The assignment is envisaged as a strategic research engagement intended to support policy and operational decision-making within the Department, and therefore the agency engaged under this RFP will be expected to provide analytical and insight-based inputs beyond routine field data collection.

#### **2. Strategic Context**

The Department of Posts operates a diverse portfolio of services across multiple sectors including Mail Services, Parcel and Logistics Services, International Mail

## Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

Services, Postal Life Insurance (PLI) and Rural Postal Life Insurance (RPLI), Post Office Savings Bank (POSB) and other financial services, as well as a range of citizen-centric services delivered through the extensive postal network across the country. In the context of evolving market dynamics and increasing competition from private sector service providers, it is considered necessary to undertake a systematic assessment of the Department's market position, customer perception and service experience across these service verticals. The proposed study is therefore intended to provide an integrated understanding of consumer behaviour and expectations in the B2C segment, decision-making frameworks and service requirements in the B2B ecosystem, comparative positioning of India Post vis-à-vis private players, market sizing of each of the verticals and the effectiveness and usability of digital platforms supporting service delivery. The findings of the study will assist the Department in identifying areas for service improvement, strengthening customer engagement and enhancing the overall relevance and competitiveness of India Post in the evolving service landscape.

### **3. Objectives of the Study**

The primary objectives of the study are as follows:

- i. To assess the level of customer (B2B & B2C) satisfaction and their perceptions across major services offered by the Department of Posts.
- ii. To analyse triggers, barriers and reasons for trust w.r.t all the 6 verticals under India Post.
- iii. To examine awareness, accessibility and usage patterns of all 6 verticals/services.
- iv. To identify service delivery gaps and operational constraints affecting customer experience.
- v. To analyse the competitive positioning of Department of Posts vis-à-vis other service providers.
- vi. To identify white spaces, and market opportunities for improvement and expansion of services.

### **4. Scope of Work:**

The Scope of Work under the assignment shall broadly include the following components:

## Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

### i. Design and Development of Survey Framework:

- ❖ A comprehensive survey framework shall be developed covering 6 service verticals of the Department of Posts.
- ❖ The framework shall capture aspects relating to consumer perceptions, market sizing, service experience and market opportunities
- ❖ A detailed study design including methodology, sampling strategy and timelines shall be prepared.
- ❖ An inception report outlining the proposed approach shall be submitted for approval prior to commencement of the survey.

### ii. Pan-India Primary Data Collection

- ❖ The survey shall cover respondents across multiple States and Union Territories.
- ❖ Adequate representation shall be ensured from rural, semi-urban and urban areas across genders & age group.
- ❖ Trained investigators shall be deployed for field data collection.
- ❖ Scientific sampling methods shall be adopted to ensure representativeness of the survey.
- ❖ Data quality monitoring and field supervision mechanisms shall be ensured.

### iii. Qualitative Research and Stakeholder Consultations

- ❖ In-depth interviews shall be conducted with consumers and institutional stakeholders.
- ❖ Focus group discussions may be organised wherever required.
- ❖ Behavioural and perception-based insights relating to service usage, accessibility and trust shall be captured.
- ❖ Key drivers influencing customer behaviour and barriers to service adoption shall be identified.
- ❖ Future opportunities shall be assessed for each vertical from the consumer POV.

### iv. Quantitative Customer Satisfaction Survey

## Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

- ❖ Structured questionnaires shall be developed for different respondent categories.
  - ❖ Awareness, usage and satisfaction levels relating to all 6 verticals shall be measured.
  - ❖ Statistical analysis shall be carried out to assess service performance indicators.
  - ❖ Key factors influencing customer satisfaction and dissatisfaction shall be identified.
- v. Assessment of Service Experience Across All 6 Verticals
- ❖ User experience relating to Mail Services shall be assessed.
  - ❖ Experience relating to Parcel and Logistics services shall be analysed.
  - ❖ Customer perception and usage of Postal Life Insurance (PLI) and Rural Postal Life Insurance (RPLI) shall be examined.
  - ❖ Customer experience relating to Post Office Savings Bank (POSB) and financial services shall be assessed.
  - ❖ Service experience relating to citizen-centric services offered through post offices shall be evaluated.
- vi. Market Perception and Competitive Analysis
- ❖ Market perception of the Department of Posts among consumers and businesses shall be analysed.
  - ❖ Market Sizing along with comparative assessment vis-à-vis respective competitive set of each vertical shall be undertaken.
  - ❖ Key competitive strengths and weaknesses shall be identified.
  - ❖ Emerging trends and opportunities in each of the 6 verticals shall be analysed.
- vii. Assessment of Digital Platforms and Customer Interface
- ❖ Usability assessment of Department of Posts digital platforms including website and mobile applications shall be undertaken.
  - ❖ Accessibility and user experience of digital services shall be analysed.
  - ❖ Barriers affecting adoption of digital services shall be identified.

## Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

- ❖ Recommendations for improvement of digital service delivery shall be provided.
  - ❖ A detailed expert audit shall be provided along with benchmarking scores for each of the platform
- viii. Study of Institutional and Business Users
- ❖ Consultations shall be conducted with MSMEs, e-commerce sellers and corporate users.
  - ❖ Institutional usage patterns and service expectations shall be examined.
  - ❖ Vendor selection criteria and decision factors for logistics services shall be analysed.
  - ❖ Potential opportunities for strengthening business services shall be identified.
- ix. Data Processing, Analysis and Insight Generation
- ❖ Proper coding, cleaning and validation of collected data shall be ensured.
  - ❖ Statistical and analytical tools shall be used for data analysis.
  - ❖ Customer segments and behavioural profiles shall be developed.
  - ❖ Key drivers influencing service adoption and customer satisfaction shall be identified.
  - ❖ Key frameworks wherever deemed necessary should be provided for clear understanding of the insights.
- x. Preparation of Reports and Recommendations
- ❖ Periodic progress reports shall be submitted during the course of the study.
  - ❖ A comprehensive analytical report shall be submitted upon completion of the assignment with learnings at India Post level along with vertical wise individual
  - ❖ Evidence-based recommendations for improving service delivery shall be provided.

Findings and recommendations shall be presented to the Department

## Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

### xi. Confidentiality, Data Ownership and Compliance

- ❖ The agency should get proper consent from the participants and the department will not be liable for any lapses.
- ❖ All information collected during the study shall be treated as confidential.
- ❖ All data generated under the study shall remain the property of the Department of Posts.
- ❖ All the collected data shall be submitted in the right format as requested by DOP along with the recordings & transcripts of all the interviews. The data shall not be used for any purpose other than the present assignment without prior approval of DOP.
- ❖ The assignment shall be carried out in compliance with applicable Government of India rules, GFR provisions and vigilance guidelines.

# Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

## **Part III: EOI Submission Format**

# Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

## Form 1: EOI Form (Covering Letter)

(Ref REOI Clause 2.3)

(To be submitted with supporting documents, if any)

(On Agency(s)'s Letter-head)

Agency(s)'s Name \_\_\_\_\_

[Address and Contact Details]

Agency(s)'s Reference No. \_\_\_\_\_ Date.....

To

DDG (Philately & Marketing)

Dak Bhawan, Department of Posts, Sansad Marg,

New Delhi – 110001

Ref: Your REOI document No. 1-4/2021-MD; Tender Title: Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

Sir/ Madam,

Having examined the above mentioned REOI document, we/the undersigned, hereby submit/ upload our Expression of Interest (EOI) for being shortlisted for the performance of the Services.

### About us:

We, M/s \_\_\_\_\_ (name of the institution), hereby certify that we are a firm/Company of proven, established and reputed Agency(s) having the required Experience, Past performance, Personnel, and Financial capability, with offices at \_\_\_\_\_ in the State of \_\_\_\_\_ which belongs to Northern/Western/Southern/Eastern & North-Eastern region.

### Our Eligibility and Qualifications to participate:

- We comply with all the eligibility criteria stipulated in this REOI document, and the relevant declarations are made along with documents in Form 1.2A of this EOI-Form.

## Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

- We fully meet the qualification criteria stipulated in this REOI document, and the relevant details are submitted along with documents in Form 2: 'Qualification Criteria – Compliance' and its sub-forms.
- We have understood the ramifications of failure to do so as detailed in clauses 9.2.4 and 9.2.5 of Section I: REOI.
- We have / don't have any conflict of interest with any other Agency(s) as per clause 4.4 of Section I: REOI.
  - No commissions and gratuities have been paid or are to be paid to agents or any other party by us relating to this REOI and RFP processes.
  - Following commissions and gratuities have been paid/ are to be paid to agents or any other party by us relating to this procurement process: .....

### **Affirmation of terms and conditions of the REOI document:**

We have understood the complete terms and conditions of the REOI document. We accept and comply with these terms and conditions without reservations, although We are not signing and submitting some of the sections of the REOI document.

### **Abiding by the EOI Validity**

We agree to keep our EOI valid for acceptance for a period upto 90 days, as required in the REOI document, or for a subsequently extended period, if any, agreed to by us.

### **Non-tempering of Downloaded REOI documents and Uploaded Scanned Copies**

We confirm that We have not changed/ edited the contents of the downloaded EOI Formats. We realize that any such change noticed at any stage, including after the contract award, shall be liable to punitive action in this regard stipulated in the REOI document. We also confirm that scanned copies of documents/ affidavits/ undertakings uploaded along with our EOI are valid, true, and correct to the best of our knowledge and belief. We shall be responsible if any dispute arises regarding the validity and truthfulness of such documents/ affidavits/ undertakings. Upon our successful short listing, we undertake to submit for scrutiny, on-demand by the DoP, originals and self-certified copies of all such certificates, documents, and affidavits/ undertakings.

### **Signatories:**

We confirm that we are duly authorized to submit this EOI and make commitments on behalf of the Agency(s). Supporting documents are submitted in Form 1.1A, annexed herewith. We acknowledge that our digital/digitized signature is valid and legally binding.

Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

**Rights of the DoP to Reject EOI(s):**

We understand that you are not bound to accept the lowest or any EOI you may receive against your above-referred EOI document.

.....  
(Signature with date)

.....  
(Name and designation)

Duly authorized to sign EOI for and on behalf of name, address, and seal of the **Agency(s)**

# Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

## Form 1.1: Agency(s) Information

(Ref REOI Clause 2.3)

(On Agency(s)'s Letterhead)

(Along with supporting documents, if any)

Agency(s)'s Name \_\_\_\_\_

[Address and Contact Details]

Agency(s)'s Reference No. \_\_\_\_\_ Date.....

REOI document No. 1-4/2021-MD; Tender Title: Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

Note: Agency(s) shall fill in this Form following the instructions indicated below. Agency(s) shall enclose certified copies of the documentary proof/ evidence to substantiate the corresponding statement wherever necessary and applicable. Agency(s)'s wrong or misleading information shall be treated as a breach of the Code of Integrity. Such EOIs shall be liable to be rejected as nonresponsive, in addition to other punitive actions provided for such a breach in the REOI document.

(Please tick appropriate boxes or strike out sentences/ phrases not applicable to you)

### 1. Agency(s) particulars:

i.	Name of the Agency(s)'s Organization:	
ii.	Corporate Identity No. (CIN):	
iii.	Date of incorporation/ start of business:	
iv.	Place of Registration/ Principal place of business":	
v.	Number of Years in Business:	
vi.	Number of Years in providing Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments :	
vii.	Agency(s)'s Website URL:	
viii.	Complete Postal Address:	

Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

ix.	Pin code/ ZIP code:	
x.	Telephone nos. (with country/ area codes):	
xi.	Mobile Nos.: (with country/ area codes):	
xii.	Contact persons/ Designation:	
xiii.	Email IDs:	
xiv.	PAN Number:	
xv.	GSTIN No:	

*Submit documents to demonstrate eligibility as per REOI Clause 4) - A self-certified copy of registration certificate – in case of a partnership firm – Deed of Partnership; in case of Company – Notarized and certified copy of its Registration; – its Byelaws and registration certificate of the firm.*

2. **Agency(s)** Organization Structure: Submit the overall organization structure of the firm.
3. **Agency(s)** Overall profile: Submit the overall profile of the firm, highlighting technical and managerial capabilities.
4. **Agency(s)**'s Authorized Representative Information
  - a) Name:
  - b) Address:
  - c) Telephone/ Mobile numbers:
  - d) Email Address:

(Signature with date)

.....

(Name and designation)

Duly authorized to sign EOI for and on behalf of name, address, and seal of the **Agency(s)**

DA: As above

## Form 1.2: Eligibility Declarations

(Ref REOI Clause 2.3)

(On **Agency(s)**'s Letterhead)

(Along with supporting documents, if any)

REOI document No. 1-4/2021-MD; Tender Title: Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

**Agency(s)**'s Name \_\_\_\_\_

[Address and Contact Details]

**Agency(s)**'s Reference No. \_\_\_\_\_ Date.....

### Eligibility Declarations

*(Please tick appropriate boxes or cross out any declaration not applicable to the **Agency(s)**)*

We hereby confirm that we comply with all the stipulations of Clause 4 of the REOI document and declare as under and shall provide evidence of our continued eligibility to DoP as and when it may be requested:

1) **Legal Entity of **Agency(s)****: We are:

a) : \_\_\_\_\_ relevant documents enclosed)

b) We are a Consulting Services provider with valid registration regarding GSTIN, PAN, EPF, ESI, Labour, or equivalent registration certificate as applicable to the subject Services.

2) **Eligibility**: We solemnly declare that we (including our affiliates or subsidiaries, or constituents):

a) are not insolvent, in receivership, bankrupt or being wound up, not have our affairs administered by a court or a judicial officer, not have our business activities suspended and are not the subject of legal proceedings for any of these reasons;

b) (Including our affiliates or subsidiaries, or constituents for any part of the assignment):

i) Do not stand declared ineligible/ blacklisted/ banned/ debarred/ convicted by the DoP or its Ministry/ Department from participation in its procurement processes; and/ or

ii) Are not convicted (within three years preceding the last date of EOI submission) or stand declared ineligible/ suspended/ blacklisted/ banned/ debarred/ convicted by appropriate agencies of the Government of India from participation in procurement processes of all its entities for offences mentioned in REOI document in this regard.

iii) Do not have any association (as **Agency(s)**/ partner/ Director/ employee in any capacity) with such retired public official or near relations of such officials of DoP, as counter-indicated, in the REOI document.

iv) We have no conflict of interest, which substantially affects fair competition. The quoted prices are competitive without adopting unfair/ unethical/ anti-competitive means. No attempt has been made or shall be made by us to induce any other **Agency(s)** to submit or not to submit an EOI to restrict competition.

- v) We certify that we fulfil other additional eligibility conditions if prescribed in the REOI document.
- 3) We certify that we are not an entity from a country identified to restrict **Agency(s)** from India from participation in their Government Procurements as per EOI clause 4.5
- 4) **Restrictions on procurement from **Agency(s)** from a country or countries or a class of countries under Rule 144 (xi) of the General Financial Rules 2017:**  
*"We have read the clause regarding restrictions on procurement from a **Agency(s)** of a country which shares a land border with India and on sub-contracting to contractors from such countries, and solemnly certify that we fulfil all requirements in this regard and are eligible to be considered. We certify that:*
  - a. we are not from such a country or, if from such a country, we are registered with the Competent Authority (copy enclosed). and;
  - b. we shall not subcontract any assignment to a contractor from such countries unless such a contractor is registered with the Competent Authority.

*"We have read the clause regarding restrictions on procurement from a **Agency(s)** having Transfer of Technology (ToT) arrangement. We certify that we do not have any ToT arrangement requiring registration with the competent authority."*

**5) Startup Status**

We confirm that we are (Certificate of Recognition issued by the Department for Promotion of Industry and Internal Trade (DPIIT) enclosed herewith)/ are not a Startup entity as per the Department of Promotion of Industrial and Internal Trade – DPIIT.

**6) Penalties for false or misleading declarations:**

We hereby confirm that the particulars given above are factually correct and nothing is concealed and undertake to advise any future changes to the above details. We understand that any wrong or misleading self-declaration would violate the Code of Integrity and attract penalties of forfeiture of performance guarantee or blacklisting.

(Signature with date)	(Name and designation)

Duly authorized to sign EOI for and on behalf of

.....  
(Name, address, and seal of the **Agency(s)**)

DA: As in Sl. 1 to 3 above, as applicable

**Form 2: Qualification Criteria - Compliance**

(Ref REOI Clause 2.3)

(On Agency(s)'s Letterhead)

(Along with supporting documents, if any)

Agency(s)'s Name \_\_\_\_\_

[Address and Contact Details]

Agency(s)'s Reference No. \_\_\_\_\_ Date.....

REOI document No. 1-4/2021-MD; Tender Title: Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

Note: Agency(s) shall fill in this Form following the instructions indicated below. Agency(s) shall enclose certified copies of the documentary proof/ evidence to substantiate the corresponding statement wherever necessary and applicable. Agency(s)'s wrong or misleading information shall be treated as a breach of the Code of Integrity. Such EOIs shall be liable to be rejected as nonresponsive, in addition to other punitive actions provided for such a breach in the REOI document.

**Form: 2.1 Application format including performance experience and Financial Strength**

**1. Past Experience of Institution (in Conducting Comprehensive Market Research Study Covering B2B and B2C Segments)**

<b>(a)</b>	<b>No. of Years working in</b> Conducting Comprehensive Market Research Study Covering B2B and B2C Segments	
<b>(b)</b>	<b>No. projects Completed in</b> Conducting Comprehensive Market Research Study Covering B2B and B2C Segments	
<b>(c)</b>	<b>Details of the projects completed in last 5 years.</b> <i>(in Chronological Order Starting from the latest)</i>	

S. No.	Project Title	Year	Client Name	Client Address & Contact Details	Value of Task undertaken (Rs. in Lakh)	Major Job Description

**2. Financial Strength of the Institution (turnover / income of last three years ending on 31<sup>st</sup> March 2025)**

Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

S. No.	Year	Amount (Rs. in Lakh)
1	2022-23	
2	2023-24	
3	2024-25	

(Share Income Tax Returns and Audited Statement of Accounts for 3 Financial Years):

Form 2.2 Financial Capability Statements

(Ref REOI Clause 2.3, Section III: Qualification Criteria) (On Agency Letter-head)

REOI document No. REOI/ xxxx; Tender Title: Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

Agency Name \_\_\_\_\_

[Address and Contact Details]

Agency Reference No. \_\_\_\_\_ Date.....

*Note to Agency: Fill out this Form for the Agency and each member of a joint venture or other association that is a party to the Agency to highlight conformance to Criteria 2: Financial Capability. The list below is indicative only. You may attach more documents as required. Add additional details not covered elsewhere in your EOI in this regard.*

Form 2.2.1: Financial Statements

*Note: Each Agency or member of a Joint Venture/Consortium making up a Agency must fill in this Form.*

Financial Data for Previous Three (3) Years			
	Year 1:	Year 2:	Year 3:
Information from the Balance Sheet			
Total Assets			
Total Liabilities			
Net Worth			
Current Assets			
Current Liabilities			
Current Liabilities			
Information from Income Statement			
Total Revenues			

Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

Profits Before Taxes			
Profits After Taxes			

- Attached are copies of financial statements (either audited financial statements supported by audit report or certified financial statements supported by Income tax returns), complying with the following conditions.
- All such documents reflect the financial situation of the Agency or a member of a Joint Venture or other association and not a sister or parent company.
  - A Chartered accountant must audit historical financial statements.
  - Historical financial statements must be complete, including all notes to the financial statements.
  - Historical financial statements must correspond to accounting periods already completed and audited (no statements for partial periods shall be requested or accepted).

.....

(Signature with date)

..... (Name and designation)

Duly authorised to sign EOI for and on behalf of

.....

Name, address, and seal of the Agency ]

Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

Form 2.2.2: Average Annual Turnover

(Ref REOI Clause 2.3, Section III: Qualification Criteria)(On

Agency Letter-head)

REOI document No. REOI/ xxxx; Tender Title: **Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments**

Agency Name \_\_\_\_\_

[Address and Contact Details]

Agency Reference No. \_\_\_\_\_ Date.....

*Note: Each Agency or member of a Joint Venture/Consortium making up a Consultant must fillin these forms.*

Annual Turnover Data (Rs. Crores) for the Last Three (3) Financial Years		
Year	Total Turnover Amount	Turnover from ConsultancyServices (supported by a certificate from the Chartered Accountants)
<b>Average Annual Turnover</b>		

.....

(Signature with date)

..... (Name  
and designation)

Duly authorised to sign EOI for and on behalf of

.....

Name, address, and seal of the Agency

**3. Any Other Information:**

**Declaration:**

Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

I hereby declare that the details mentioned by me as above are true to the best of my knowledge and belief. I agree to provide photocopies of proofs for all the above information furnished, as required by the Department of Posts.

(Signature with date)	(Name and designation)

Duly authorized to sign EOI for and on behalf of

.....

.....

(Name, address, and seal of the **Agency(s)**)

Details of the Person Submitting the Application			
<b>Name</b>		<b>Designation</b>	
<b>Mobile Number</b>		<b>E-Mail ID</b>	

**Form 3: Checklist for Agency(s)**

(Ref REOI Clause 2.3)

(On Agency(s)'s Letterhead)

Agency(s)'s Name \_\_\_\_\_

[Address and Contact Details]

Agency(s)'s Reference No. \_\_\_\_\_ Date.....

REOI document No. 1-4/2021-MD; Tender Title: Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

*Note to Agency(s): This checklist is merely to help the Agency(s) to prepare their EOIs. It does not override or modify the requirement of the EOI. Agency(s) must do their due diligence also.*

S. No.	Documents Submitted, Duly Filled, Signed	Yes/ No/ NA
1.	Form 1A- EOI Form (to serve as covering letter)	
2.	Form 1.1A: Agency(s) Information	
3.	Form 1.2A: Eligibility Declarations (along with supporting documents)	
4.	Form 2: Qualification Criteria - Compliance	
5.	Form 3: This Checklist	
6.	Any other requirements, if stipulated in Section II: Appendix; or if considered relevant by the Agency(s)	

.....  
(Signature with date)

.....  
(Name and designation)  
Duly authorized to sign EOI for and on behalf of.....  
(Name, address, and seal of the Agency(s))

**Other Documents**

**Annexure 1: Authorization to Attend Pre-EOI Conference**

Refer to REOI Clause 6.3)

(On The **Agency(s)** Letter Head)

**Agency(s)**'s Name [Address and Contact Details]

**Agency(s)**'s Reference No. \_\_\_\_\_ Date \_\_\_\_\_

To

DDG (Philately & Marketing) (Marketing)

Dak Bhawan, Department of Posts, Sansad Marg,

New Delhi – 110001

**Subject: Authorization to attend Pre-EOI Conference on dated: \_\_\_\_\_**

The following persons are authorized to attend the Pre-EOI Conference for the EOI mentioned above on behalf of \_\_\_\_\_

\_\_\_\_\_

S. No.	Name	Government Photo ID Type/ Number
1		
2		
Alternate Representative		

Note:

- a) Maximum of two representatives (carrying valid Government photo IDs) shall be permitted to attend the Pre-EOI opening. An alternate representative shall be permitted when regular representatives are not able to participate.
- b) Permission to enter the hall where the Pre-EOI conference is conducted may be refused if authorization as prescribed above is not submitted.

Signatures of **Agency(s)**

or

The officer authorized to sign the EOI.

Documents on behalf of the **Agency(s)**

Name, address, and seal of the **Agency(s)**

**Annexure 2 : Code of Integrity for Public Procurement**

Procuring authorities as well as bidders, suppliers, contractors, consultants, and service providers should observe the highest standard of ethics and should:

a) Not indulge in the following prohibited practices, either directly or indirectly, at any stage during the procurement process or during execution of resultant contracts:

i) "Corrupt practice": making offers, solicitation or acceptance of bribe, rewards or gifts or any material benefit, in exchange for an unfair advantage in the procurement process or to otherwise influence the procurement process or contract execution;

ii) "Fraudulent practice": any omission or misrepresentation that may mislead or attempt to mislead so that financial or other benefits may be obtained, or an obligation avoided. This includes making false declaration or providing false information for participation in a tender process or to secure a contract or in execution of the contract;

iii) "Anti-competitive practice": any collusion, bid rigging or anti-competitive arrangement, or any other practice coming under the purview of The Competition Act, 2002, between two or more bidders, with or without the knowledge of the Procuring Entity, that may impair the transparency, fairness, and the progress of the procurement process or to establish bid prices at artificial, non-competitive levels;

iv) "Coercive practice": harming or threatening to harm, persons, or their property to influence their participation in the procurement process or affect the execution of a contract;

v) "Conflict of interest": any personal, financial, or business relationship between the bidder and any personnel of the procuring entity who are directly or indirectly related to the procurement or execution process of the contract, which can affect the decision of the procuring entity directly or indirectly;

vi) "Undue Advantage": improper use of information obtained by the bidder from the procuring entity with an intent to gain an unfair advantage in the procurement process or for personal gain. This also includes if the bidder (or his allied firm<sup>24</sup>) provided services for the need assessment/ procurement planning <sup>25</sup> of the tender process in which he is participating;

vii) "Obstructive practice": materially impede the Procuring Entity's investigation into allegations of one or more of the above mentioned prohibited practices either by deliberately destroying, falsifying, altering; or by concealing of evidence material to the investigation; or by making false statements to investigators and/or by threatening, harassing or intimidating any party to prevent it from disclosing its knowledge of matters relevant to the investigation or from pursuing the investigation; or by impeding the Procuring Entity's rights of audit or access to information;

Yours faithfully

(Signature of the Authorized Signatory of Bidder with Official Seal)

Format 1: Human Resources Certificate

*(To be issued under the letterhead of the Agency by the HR)*

It is certified that M/s \_\_\_\_\_ having its Registered Office at \_\_\_\_\_ is having \_\_\_\_\_ nos. of personnel in Agency and related Services on its payroll (as on 20.03.2026).

This certificate is issued based on documentary evidence and copies of which are available with me that I shall be able to produce if required by the Authority. The certificate is true and correct to the best of my knowledge and belief.

Organizational strength showing designation and number of employees is attached herewith.

(Signature)

Name of the Person	
Designation	HR Head
Email address	
Contact No.	

Date:

Place:



## Engagement of Professional Research Agency for Conducting Comprehensive Market Research Study Covering B2B and B2C Segments

### Format 2: Project Citation

*(To be issued under the letterhead of the Agency)*

<b>General Information</b>	
Name of the project	<i>(Provide reason in case information is case information is being withheld)</i>
Client for which the project was executed	<i>(Provide reason in case information is case information is being withheld)</i>
Name and contact details of the client	<i>(Provide reason in case information is case information is being withheld)</i>
<b>Project Details</b>	
Description of the project	
<b>Areas covered under Scope of services</b>	
Market Research & Data Collection (Qualitative + Quantitative, B2B & B2C)	(Y/N)
Consumer & Business Insights (Perception, Behaviour & Decision Journeys)	(Y/N)
Brand Positioning & Perception Assessment	(Y/N)
Customer & Digital Experience Assessment (Physical + UX)	(Y/N)
Competitive Benchmarking & Market Analysis	(Y/N)
Market Sizing & Opportunity Assessment	(Y/N)
Strategic Insights & Recommendations	(Y/N)
Outcomes of the project	
<b>Other Details</b>	
Total cost of the services provided by the respondent	
Duration of the project (no. of months)	
Start Date & Completion Date (as applicable)	
Current Status of the Project	
<b>Any other relevant information</b>	