

MINUTES

Pre-bid meeting for RFP for appointment of survey agency for conducting SEBI SCORES Survey

The pre-bid meeting on the RFP for appointment of survey agency for conducting SEBI SCORES Survey was held by NISM (virtually) on 18th February 2021 at 3pm. The list of participants is enclosed (Annexure 1).

The meeting started off with the host welcoming the officials from SEBI, NISM and various interested agencies. Following this the RFP document and its content was briefly explained and the pre-bid queries from various interested agencies, received by NISM were discussed in detail. The list of queries along with NISM's response is enclosed (Annexure 2).

Henceforth, this minute along with its annexures are to be considered as an addendum to the RFP (for appointment of survey agency for conducting SEBI SCORES Survey) document published by NISM on 5th February 2021.

Annexure 1**Scores Survey 2021 : Pre -Bid Meeting Attendees**

SL.NO	Name	Email	Date	Start time	End time	Duration	Company
1	jhansi	jhansi.d@mydatawise.com	2/18/2021	3:03 PM	4:03 PM	60 mins	Datawise Management Services India Pvt. LTD
2	vinay	vinay@mydatawise.com	2/18/2021	3:02 PM	3:08 PM	7 mins	Datawise Management Services India Pvt. LTD
3	Arpana Chandra	arpana.c@mydatawise.com	2/18/2021	2:59 PM	4:03 PM	64 mins	Datawise Management Services India Pvt. LTD
4	Dr.Anil Dhaneshwar	anil.dhaneshwar@gmail.com	2/18/2021	3:06 PM	4:03 PM	57 mins	Genesis Management and Market Research Pvt. Ltd
5	M. Sekar	sekar.m@maction.com	2/18/2021	3:25 PM	4:03 PM	38 mins	Maction Consulting Pvt. Ltd
6	shikha Mehta	s.mehta@maction.in	2/18/2021	3:21 PM	4:03 PM	42 mins	Maction Consulting Pvt. Ltd
7	sarang panchal	sarang.panchal@mrssindia.com	2/18/2021	2:57 PM	4:04 PM	67 mins	Morsel Research and Development Pvt Ltd
8	itd itd	itd@nism.ac.in	2/18/2021	2:46 PM	4:05 PM	80 mins	NISM Team
9	Kuldeep Thareja	kuldeep.thareja@nism.ac.in	2/18/2021	3:01 PM	4:03 PM	62 mins	NISM Team
10	Nitin Tike	nitin.tike@nism.ac.in	2/18/2021	3:01 PM	4:04 PM	64 mins	NISM Team
11	Sandeep K Biswal	sandeep.biswal@nism.ac.in	2/18/2021	2:50 PM	4:03 PM	73 mins	NISM Team
12	Medha Sonparote	medhad@sebi.gov.in	2/18/2021	3:04 PM	4:03 PM	59 mins	SEBI Team
13	geetha	geetak@sebi.gov.in	2/18/2021	2:57 PM	3:50 PM	54 mins	SEBI Team

ANNEXURE 2

Response to pre-bid queries against RFP for appointment of survey agency for conducting SEBI Complaint Redress System (SCORES) survey (Last date for submission March 05, 2021)		
Sl. No.	Query	NISM's Response
Agency: Genesis Management and Market Research Pvt. Ltd.		
1	Page 8 at Sr. No.6 Deliverables you mentioned about acquiring intellectual property rights on perpetuity and on umbrella basis. We are not clear about its meaning. Kindly explain.	For any licensed software/ tools used by the selcted agency for performing tasks as defined in the scope of work of this RFP, the agency shall have the right as well as the right to license for the outsourced services. Any license or IPR violation on the part of the agency should not put NISM or SEBI at risk.
2	We are a registered MSME and request you to grant us exemption from EMD amount of Rs.10,000/-.	Not Applicable.
3	We also request you to permit us to use online survey method in addition to CATI method.	Online survey method is not permitted.
4	We will require 5 times database of actual interviews to be taken i.e. 1820. We also request you to display the survey link on NISM and SCORE website to invite responses to the survey link.	Database with sufficient replacement samples will be shared. Since online survey method is not permitted, displaying the link on NISM or SCORE website does not arise.
Agency: Morsel Research and Development Pvt. Ltd.		
5	Is the EMD amount is refundable?	Refer to section 14 (General terms and Conditions), sub-section 14.5 of the published RFP.
6	What is the sample size per location(15 cities)?	To be estimated by the selected agency in cosultation with NISM and SEBI.
7	Will your team provide the sampling frame of the Investors and Complainants?	Yes.
8	Is it necessary to use CATI and CAPI for both online and offline complaints user data collection? As our objective is to records the interview which we can do in the survey CTO as well (Platform we are using to build application and data collection & Storage).	Yes.
9	If any organization will not have the 3 consumer satisfaction surveys in the last three years, would it not eligible for the bidding process? (mentioned in the eligibility point 5, Just wanted to confirm it)	Refer to section 9, point no. 4 of the published RFP.
Agency: Maction Consulting Pvt. Ltd.		
10	Whether SEBI will provide the name, address, contact details etc. of the investors and complainants who have lodged their complaints (each record having details on offline and online separately)	Yes.
11	Whether SEBI will provide any guidelines to see who is an investor-cum complainant, who is just a complainant not an investor?	Irrelevant.
12	Gender break-up will be followed as per the gender ratio available for each city (from the sample file that you provide)	Yes.

ANNEXURE 2

13	We need to cover these cities: Mumbai, NCT of Delhi, Ahmedabad, Kolkata, Pune, Bengaluru, Chennai, Jaipur, Hyderabad, Vadodara, Gurugram, Lucknow, Surat, Ghaziabad, and Dhanbad. Is this strictly City or any semi-urban/rural areas nearby city to be covered?	Samples drawn will be mostly confined to the city limits. However, a few samples may fall in areas adjacent to the city.
Agency: Datawise Management Services India Pvt. Ltd.		
14	Rs. 10000/- (Rupees Ten Thousand only) by means of Demand Draft/ Banker Cheque drawn on any scheduled commercial bank. Any waiver applicable for MSME companies.	Not Applicable.
15	SEBI SCORES Survey' in fifteen cities across India (Mumbai, NCT of Delhi, Ahmedabad, Kolkata, Pune, Bengaluru, Chennai, Jaipur, Hyderabad, Vadodara, Gurugram, Lucknow, Surat, Ghaziabad, and Dhanbad) based on the sample provided by SEBI. What is the basis of city selection?	Cities are selected on the basis of type and number of complaints received, among other things.
16	What is the division of sample across cities? We understand that there are 15 odd categories for SCORES complaints. How is it proposed to be sampled? So, should we have different set of questions for each category of complaints? Is the sample of 1,820 across all categories?	To be estimated by the selected agency in consultation with NISM and SEBI. There will be two different sets of questionnaire, one for physical and one for e-complaint category. Sample of 1820 is across all categories.
17	NISM will give us complainant contact number to conduct CATI?	Yes.
18	During the pre-bid meeting, the Agency shall provide a proposed sampling approach Why should we give sampling plan in pre bid? It should be part of our proposal	The agency need not provide the proposed sampling approach during pre-bid. However, it should be part of the technical bid.
18	Why do we need to submit Bank Guarantee for every installment received?	It is a part of procurement policy (services) of NISM.
20	The Agency should have conducted a minimum of 3 surveys during the last 3 years as on 31st March, 2020. Request to consider surveys conducted in last 5 years.	Refer to section 9 (Minimum Eligibility Criteria), point no. 4 of the published RFP.
21	Add MBA as desired qualification for Research Director. Add MBA as desired qualification for Subject Matter Expert.	Refer to section 11 (Evaluation Method), point no. 4 and 5 of the published RFP.
22	If 70% marks is for Technical presentation then do, we need to submit our understanding and approach in technical proposal. When will be the technical presentation held? What will be the duration of technical presentation?	Refer to section 10 (Instruction to Agencies), sub-section 10.2.(e) of the published RFP. Refer to section 1 (Key information and Dates) of the published RFP. Duration of the technical presentation will be 15 minutes per eligible agency.