

**Invitation of Bids for Engagement of Data Collection (Field Survey) Agency: on Impact Assessment Study of Atal Pension Yojana – APY**

The Centre for Financial Services (CFS), Management Development Institute (MDI) Gurgaon invites technical and financial bid from reputed and experienced research/data collection agencies for engagement as a Data Collection Agency for conducting a large-scale PAN India level field survey under the “Impact Assessment Study of Atal Pension Yojana (APY)”.

The Atal Pension Yojana (APY), launched in 2015 by the Government of India, has established itself as a cornerstone of India’s efforts to provide social security for workers in the unorganized sector. Over the years, APY has achieved impressive growth, with a subscriber base exceeding 7.65 crore as of April 2025 and a pension corpus nearing ₹46,000 crore. This rapid expansion reflects a significant demand for retirement security among India’s informal workforce.

This study is being conducted to understand how the APY scheme is working for its subscribers and stakeholders. The purpose is to evaluate the impact of the scheme on financial security, retirement planning, and overall satisfaction among beneficiaries, especially those in the unorganized sector. The study aims to gather feedback from APY subscribers to improve the effectiveness, accessibility, and awareness of the scheme.

The selected agency shall be responsible for conducting the following within 45 days from the date of acceptance of the offer. The scope of work is given below but not limited to the following:

- Conduct structured face-to-face interviews with 7,600 APY subscribers across all the States/UTs using computer-aided personal interview or equivalent digital platform.
- Follow stratified sampling design as provided by the project research team.
- Use structured questionnaire (4 pages) (to be provided by MDI).
- The data collection agency required to translate the questionnaire by a language expert into required regional languages in Indian States where data collection is to be conducted.
- Participant shall be provided with the Information Sheet and those who are willing to participate their consent shall be taken. The consent form is to be signed by the respondent before the survey and the original signed copy to be submitted to MDI Gurgaon.
- Daily data upload and quality checks have to be done.
- Provide cleaned and validated dataset.
- Submit field progress reports daily.
- Ensure adherence to ethical standard and confidentiality norms.

Sampling Considerations	Description
Region	PAN India
Demography	Age, Gender, Income class, Other demographic factors

Subscriber profile	APY Subscriber profile will be based on their demographic details as well as APY Pension Slabs, active/dropped out
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Feature	Survey research for APY subscribers across India
Survey type	PAN India
Sample design	A stratified random sampling in a cluster framework will be used to ensure national representation. The sample will be selected based on secondary APY enrolment data, covering different states and Union Territories with varying levels of scheme penetration
Coverage	All States and Union Territories in India
Unit of selection	Stratified Random Sampling (sampling plan to be provided by MDI Gurgaon)
Reference period	One and half month (45 Days)
Sample size	7600  + 10% additional sample accounting for the non-response rate. No extra charges will be given for additional 10% sample later on. MDI Gurgaon will not bear any additional cost.
Method of data collection	Face-to-Face interview (collected physically) The final survey approach will be discussed only after the approval of MDI Gurgaon
Respondents	APY Subscribers
Survey time	Around 45 minutes for each interview

#### Eligibility Criteria

S. No.	Eligibility Criteria	Supporting Proof / Documents Required
1	The agency must be registered either as a Company under the Companies Act or as a Limited Liability Partnership (LLP) under the LLP Act.	Copy of Registration Certificate / Certificate of Incorporation indicating date of incorporation, legal status, and registered address.
2	The agency should have a minimum of 5 years' experience in conducting large-scale socio-economic surveys.	Documentary evidence such as work orders, completion certificates, or client references demonstrating experience in large-scale surveys.
3	The agency must have experience in handling data collection projects involving a minimum of 2,000 respondents or more and should have achieved a turnover of INR 2 crore or above in the last three financial years (2022-23, 2023-2024, 2024-25).	(i) Details of relevant projects undertaken (with number of respondents) supported by work orders/completion certificates. (ii) CA Certificate certifying annual turnover for the last three financial years.
4	The agency must have valid PAN and GST registration.	Copy of PAN Card and GST Registration Certificate.
5	The agency should not have been blacklisted by any Government	Undertaking on the agency's letterhead, duly signed and stamped by the

	Department, PSU, Autonomous Body, or Academic Institution.	authorised signatory, stating that the agency has not been blacklisted by any Government/Institution.
6	The agency must have availability of a minimum of 25 trained field investigators across India (PAN-India presence).	List of field investigators with brief profiles (qualification, experience, location)
7	The agency must have the ability to capture accurate data using CAPI (Computer Assisted Personal Interviewing) or an equivalent digital data collection platform.	Documentary evidence demonstrating availability and prior usage of CAPI/digital platform (e.g., screenshots, system details, sample reports, client certificates, or technical capability statement).

#### A. Format of Technical Bid

**Details of the Agency and Eligibility Criteria (to be submitted on official letter head and duly signed by authorised signatory)**

- Name & Address of Organization
- Contact Person with Phone & Email
- Statement and documentary evidence of Eligibility Criteria (1 to 7)

**B. Financial Bid (To be submitted on official letter head and duly signed by authorised signatory)**

#### Quantitative Survey (7,600 APY Subscribers)

Particulars	Rate per Interview (Rs.)	Total Amount (Rs.) (Excluding GST)
Survey (including travel, logistics, data entry, supervision, data validation, coding and cleaning)		

**Total Project Cost (Inclusive of all charges except GST):**

GST @ applicable rate:

Grand Total:

#### C. Deliverables

1. The survey questionnaire to be provided by MDI Gurgaon research team and is to be translated, and finalised by the survey agency by the end of week 1
2. Survey roadmap with clear identification of areas/spots across all States/Union territories and a clear outline of field team movement – by the end of week 1
3. Questionnaire digitisation and monitoring facility to get daily or weekly update of progress on listing, sampling and interviewing – by the end of week 1.
4. Training of enumerators with piloting of 10% of the batch – by the end of week 2
5. Completion of quantitative data collection – by the end of week 5

6. Cleaned and error-free data sets with all documentation, by the end of week 6
7. Summary report and presentation to CFS, MDI's committee – by the end of an additional 1 week

#### **D. Terms and Conditions**

1. The bidder is expected to read all instructions forms, terms, and specifications in the bidding documents. Failure to furnish all information required in the bidding documents or submitting a bid not substantially responsive to the bidding documents in any respect may result in the rejection of the bid.
2. The bidder who meets eligibility criteria, only their financial bid will be opened.
3. The bidder shall bear all the costs associated with the preparation and submission of its bid, and MDI Gurgaon in no case will be responsible or liable for these costs, regardless of conduct or outcome of bidding process.
4. The rates quoted shall be all-inclusive except statutory taxes.
5. The agency shall complete the entire fieldwork within 45 days of award of contract.
6. MDI Gurgaon reserves the right to cancel the quotation without assigning any reason at any stage.
7. The agency must ensure strict confidentiality of respondents' data.
8. All data collected shall be the property of MDI Gurgaon.
9. Any deviation from approved methodology must be informed and approved in writing which may have financial implications.
10. No record of any data or information collected for APY Impact Assessment Study shall be used or kept by the data collection agency after the final acceptance of the complete dataset.
11. Failure of the successful bidder to comply with all the requirements shall constitute sufficient grounds for the annulment of the award, in which event the MDIG may make the award to the next best L2 bidder or call for new bids.
12. In case, there is a change in the constitution of the implementing agency, its successor body shall be bound by the agreement during its tenure.
13. No commitment of any kind, contractual or otherwise shall exist unless and until a formal written contract has been executed by or on behalf of MDIG. The MDIG may cancel this tender or contract at any time prior to a formal written contract being executed by or on behalf of MDIG.
14. If L1 bidder refuses to accept the work order within 07 days from the date of issue of work order from MDIG, the offer will be treated as withdrawn besides, debarring and blacklisting the bidder for at least three years, for further dealings with MDIG.
15. In case L1 bidder fails to deliver the project within delivery period or further in any specified period due to applicability of force majeure condition specified, the work order/contract with L1 bidder will be terminated and no payment for any leftover/partial work will be paid by MDIG. In such a case, MDIG may ask L2 bidder to execute the remaining work by matching the price of L1 bidder and undertaking by prospector bidders must be submitted in this regard in their technical bid.

The eligible, reputed and interested agencies may submit their technical and financial bid in a sealed envelope.

Technical Bid (Statement and documentary evidence on meeting eligibility criteria) shall be placed in sealed envelope 'A' with title 'Technical Bid'.

Financial bid/quote to be submitted on official letterhead shall be placed in a sealed envelope 'B' with title 'Financial Bid'.

Forwarding letter along with envelope A- Technical Bid and envelope B- Financial Bid shall be placed in the outer envelope.

The closed bid must reach on or before **12 March, 2026 (Thursday)** up to **5:00 PM** through speed post/register post/courier on a sealed envelope and submitted to the following address.

Centre for Financial Services, Management Development Institute Gurgaon, Mehrauli Road, Sukhrali, Gurugram – 122007, Haryana, INDIA, Tell: +91-124-4563252, Email: [cfs@mdi.ac.in](mailto:cfs@mdi.ac.in)

The Bids received after the due date and time shall not be considered.

**Note:**

1. Relevant documents must be attached.
2. Absence of required documents may lead to disqualification.

*V. Malavi*  
*02/03/2026*

Signature of Authorized Signatory