

## 1. Background

The fortified rice kernel and fortified rice manufacturing industry in India has witnessed significant growth and change over the past few years, driven by changing trends in markets, consumer preferences, technology, and regulations. The demand for fortified rice kernel and fortified rice products is growing due to the increasing awareness about malnutrition and the government's advisory that the Targeted Public Distribution System (TPDS) beneficiaries will receive fortified rice in their ration by 2024. Malnutrition is a severe problem in India, and the addition of essential nutrients such as iron, Folic acid, and vitamin B12 through fortified rice kernels and fortified rice can go a long way in addressing this problem and ameliorating their deficiencies.

However, this growth also raises concerns about the emerging skill shortages due to a mismatch between the demand for specific skills and the available workforce. In recent years, shortages of skilled, semi-skilled, and unskilled workers have become a critical factor impacting the competitiveness of the fortified rice kernel and fortified rice manufacturing industry in India. As the industry advances, the demand for skilled manpower is expected to increase exponentially.

To achieve the projected growth targets and become globally competitive, it is essential to develop and train the workforce efficiently. India can harness all the opportunities present in the fortified rice kernel and fortified rice manufacturing sector only when its labour force is educated and skilled. Therefore, it is critical to conduct a study on the skill shortage and anticipate the future demand for the workforce in the fortified rice kernel and fortified rice manufacturing industry for the period 2023-2026.

This study will help identify the gaps in the existing workforce and analyse the specific skills needed to meet the future demand of the industry. Based on the findings, the industry can devise strategies to bridge the skill gap by investing in training programs, apprenticeships, and other capacity-building initiatives. The study will also help in identifying the challenges and opportunities for the industry and develop a roadmap for its sustainable growth.

## 2. Role of Food Industry Capacity and Skill Initiative in Skill Development

Food Industry Capacity & Skill Initiative (FICSI) — widely known as Food Processing Sector Skill Council—is a Not-for-Profit Organization, registered under the Societies Registration Act, 1860. The organisation is Promoted by the Federation of Indian Chambers of Commerce and Industry (FICCI) with support by National Skill Development Corporation (NSDC) under Ministry of Skill Development & Entrepreneurship. FICSI is recognised as an Awarding Body by the National Council for Vocational Education and Training (NCVET)

FICSI is an industry led body mandated to create skilled manpower for Food Processing Industries. FICSI provides the following services:

- Development of standards, content and curriculum aligned with the National Skill Qualifications Framework.
- Organise human resource requirement forecasts and skill gap surveys
- Responsible for conducting the assessment & certification of the trained candidate in the food processing job role.
- Provide affiliation and accreditation to training providers or training centres.
- Plan and facilitate the execution of Training of Trainers
- Undertake execution of Skill related programs

### **3. Request for Proposal**

Food Industry Capacity & Skill Initiative (FICSI) hereby invites proposals from reputed consulting firms or expert institutions having adequate experience of conducting studies involving big data and large sample size as indicated in the succeeding paras.

The proposal must be submitted physically via courier/hand by 25.10.2023 (revised date) by 5:00 pm.

#### **3.1 Schedule and Critical Dates (Tentative):**

The tentative schedule and critical dates related to this RFP are shown below:

<b>Sr. No.</b>	<b>Event</b>	<b>Date</b>
1	Date of Uploading RFP on the FICSI'S website	16th Sept 2023
2	Last date of the submission of the bid (Technical & Financial)	25th Oct. 2023
3	Presentation by Shortlisted bidders	27th Oct. 2023
4	Selection of final Bidder	7th Nov. 2023

The FICSI reserves the right to amend the RFP, tentative schedule and critical dates.

Pre-bid meeting will be held in FICSI's office (Shriram Bhartiya Kala Kendra Building (3 Floor), Copernicus Marg, New Delhi, Delhi- 110001) on the scheduled date. Outstation parties will have an option of joining online.

### **4. Objective of the Study**

This study is being commissioned to ascertain the skills required in fortified rice kernel & fortified rice manufacturing industry, and the present and future gap in skill sets The Study will befor the period 2023-26.

Scope of Work and Terms of Reference (ToRs) for conducting Research/Study on Skill requirement in the Rice Fortification Sector (2023-26):

The study would cover the following sectors of food processing in Rice Fortification:

- 1) Fortified Rice Kernel Manufacturing.
- 2) Fortified Rice Manufacturing (Rice Millers)

## 5. Scope

The scope of work would cover following points:

### 5.1. Industry, Market & technological Trends in Fortified Rice Kernel & Fortified Rice Manufacturing.

#### 5.1.1. Market Size and Growth Rate

- Estimate the market size and growth rate of the rice fortification sector, considering factors such as consumption patterns, population growth, and government initiatives.
- Identify the key drivers of market growth, including factors such as increasing awareness about the nutritional benefits of fortified rice, rising consumer demand for healthier food options, and government regulations promoting rice fortification.
- Forecast the future market size and growth rate, considering anticipated changes in consumer preferences, dietary patterns, and economic conditions.
- Create a database of existing FRK manufacturers and rice millers and their associations in India.

#### 5.1.2. Market Dynamics and Competition

- Evaluate the competitive landscape of the rice fortification sector, including an analysis of key players, market share, and market concentration.
- Assess the entry barriers, market entry strategies, and competitive advantages of existing players in the fortified rice kernel manufacturing and fortified ricemanufacturing sub-sectors.
- Identify emerging trends and innovations in the industry, such as new product development, technological advancements, and strategic collaborations.

#### 5.1.3. Technological Advancements and Automation

- Investigate the impact of technological advancements on the rice fortification sector, such as automated production processes, quality control systems, and packaging innovations.
- Assess the extent of automation and its effect on employment levels and skill requirements in the industry.
- Identify emerging technologies and their potential to reshape the rice fortification sector, including areas such as product development, process optimization, and supply chain management.

#### 5.1.5. Challenges and Opportunities

- Identify the key challenges faced by the rice fortification sector, such as limited consumer awareness, logistical constraints, quality control issues, and regulatory compliance.
- Explore the potential opportunities for growth and innovation in the sector, including untapped markets, product diversification, and collaborations with stakeholders in the food industry.

#### 5.2 Skill Requirement over a period of 2023-26 in major 5 clusters of India

##### 5.2.1 Identify Skill Gaps and Future Skill Requirements:

- Identify the gaps between the current workforce's skill sets and the skills required in the future.
- Analyse the anticipated changes in job roles, technological advancements, industry best practices and food regulatory requirements to determine the future skill requirements.
- Assess the need for upskilling or reskilling programs to bridge the identified skill gaps and prepare the workforce for future challenges.

##### 5.2.2. Provide Recommendations:

- Develop strategies for addressing the identified skill gaps, such as training programs, vocational courses, and industry-academia partnerships.
- Recommend policy initiatives to support the development of a skilled workforce in the rice fortification sector, considering collaboration between relevant stakeholders.
- Provide recommendations on the development of e-learning programs, learning videos and customized courses to address the skill gaps.

#### 5.3. Strategic Roadmap and Action Plan for Fortified Rice Sector

5.3.1. Identify and prioritise the top challenges/ problem areas emerging from each component of the project.

5.3.2. Develop 3-year action plan outlining the approach to mitigate the skill gap and development of relevant skill sets for the future including effective ways of undertaking skilling activities with public and private sector involvement.

## 6. Methodology

The study methodology will consist of primary survey and secondary research. It is suggested that through primary research the study will identify the present scenario of Fortified rice kernel and fortified rice manufacturing sector. Primary survey will also help to validate the data of

secondary research and through secondary research the employment projection will be made considering several factors. Additionally, the methodology may include:

1. Total sample size to be included as part of this study should cover Fortified rice kernel manufacturers (FRK) and fortified rice manufacturers.
2. Sampling must cover all major sub sectors (Fortified rice kernel Manufacturers & fortified rice manufacturers), States and sizes of industrial units within each cluster.
3. Structured questionnaires will be designed for discussions with various stakeholders.
4. There will be an appropriate number of focused group discussions for conducting the primary survey by using structured questionnaires.
5. Appropriate number of focus group discussions targeting separately fortified rice kernel manufacturers and fortified rice manufacturers may be administered in each zone to understand the overall industry landscape to estimate the future employment scenario and skill requirements considering all the factors.
6. An appropriate number of focus group discussions covering major clusters in the sector would be undertaken to identify the skill gaps and technological advancements.
7. Bidders need to mention the database, total sample size separately for FRK & Rice millers, state along with a number of focused group discussions.

## **7. Deliverables**

The skill gap study in the fortified rice manufacturing sector will be conducted within a timeline of 3 months. The following deliverables and timeline schedule will be followed:

### **7.1 Inception Report:**

- Submission of a soft copy of the inception report within 7 days of project allocation.
- The inception report will outline the consultant's plan of action, draft questionnaire, and a timeline for conducting the study.
- This report will ensure mutual understanding and alignment between the consultant and the stakeholders.

### **7.2 Monthly Progress Reports:**

- Submission of monthly progress reports on the last working day of every month.
- The reports will consist of activities completed in the current month and a plan for future activities in the next month.
- These reports will provide regular updates on the study's progress and allow for monitoring and adjustment if necessary.

### 7.3 Draft Final Report:

- Submission of the draft study report (five copies) with a soft copy, along with a PowerPoint presentation and a summary report on 45<sup>th</sup> Day post allocation of the work order.
- The draft report will cover all aspects of the study.
- It will incorporate the objectives of the study in detail, presenting the findings, analysis, and recommendations.

### 7.4 Final Report:

- Submission of the final report (5 copies), summary report (5 copies) with soft copies along with a PowerPoint presentation within 7 days after receiving comments/suggestions from the Food Processing Sector Skill Council on the draft report.
- The final report will encompass the comprehensive findings, analysis, and recommendations of the skill gap study.

## 8. Project completion schedule

The Project is expected to be completed within 3 months from the date of allocation.

### 8.1 Validity of Proposal

The proposal should be valid for a period not less than one-month (30) days from the due date for receiving the proposal.

### 8.2 Eligibility Conditions for Bidders:

To participate in the bidding process, consulting firms or expert institutions must meet the following eligibility conditions. Documentary evidence must be provided to support the fulfilment of these conditions:

#### 8.2.1 Experience in Dealing with Economic Policies and Government Programs:

The agency must have a minimum of five years' experience in dealing with economic policies and the evaluation of macro-economic issues, plans, policies, and schemes of government programs.

Documentary evidence of the agency's experience should be enclosed.

**8.2.2 Successful Completion of Relevant Studies:**

The agency must have successfully completed at least five studies related to gap analysis in skill sectors and economic surveys or socio-economic surveys of sectors in the economy.

Details of these studies should be furnished.

**8.2.3 Minimum Average Annual Turnover:**

The agency must have a minimum average annual turnover of Rs. 5.00 Cr during the last three financial years.

The last three years' balance sheet or audited statements of account must be submitted as proof.

**8.2.4 Adequate Technical Resources:**

The agency must have a well-qualified and experienced technical resource base for portal development and maintenance services. The team composition should include a minimum of 50 persons, with their EPFO details and qualification information to be submitted.

**8.2.5 No Blacklisting:**

The agency should not be blacklisted by any Ministry/Department of the Government of India, state governments, organisations, or undertakings.

A self-declaration on the agency's letterhead confirming non-blacklisting should be provided.

**8.2.6 GST and Income Tax Registration:**

The applicant should have GST registration and be an income tax assessee with valid GST registration and a valid PAN number.

The technical bids will be screened based on these essential eligibility criteria. Supporting documents for items 1 to 6 must be enclosed. Proposals that do not comply with the eligibility conditions will be summarily rejected.

## **9. Brief Description of the Selection Process**

### **9.1 Evaluation Process**

Prior to evaluation of Proposals, the FICSI will determine whether each Proposal is responsive to the requirements of the RFP. A Proposal shall be considered responsive only if:

- a. It is received by the due date including any extension thereof;
- b. it contains all the information (complete in all respects) as requested in the RFP;
- c. it does not contain any condition or qualification;

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The FICSI reserves the right to reject any Proposal, which is non-responsive and no request for alteration, modification, substitution, or withdrawal shall be entertained by the FICSI in respect of such Proposals.

### 9.2 Evaluation Protocol:

The first stage of evaluation process for selecting the consulting agency will involve assessment of the Technical Proposal. Only those Applicants whose Technical Proposal score 70 marks or more out of 100 marks shall qualify for further consideration.

### 9.3 Evaluation of Technical Proposals

The Technical Evaluation will be in the following format.

Sr. No.	Criteria	Maximum Marks
<b>A</b>	<b>Number of years of experience in conducting studies in various sectors of Economy involving big data and large sample size</b>	<b>20</b>
A1	- Having experience of equal to or more than 10 Years	20
A2	- Having experience of less than 10 years but equal to or more than 7 Years	15
A3	- Having experience of less than 7 years but equal to or more than 5 Years	10
A4	- Having experience of less than 5 Years	0
<b>B</b>	<b>Number of studies relating to gap in skill sectors and economic surveys/socio-economic surveys of the sectors of economy</b>	<b>20</b>
B1	- Have completed 5 or more such studies	20
B2	- Have completed 4 such studies	15
B3	- Have completed 3 such studies	10
B4	- Have completed 1 to 2 such studies	5
B5	- Have completed no such studies	0
<b>C</b>	<b>Relevant qualification and experience of the team leader and its members</b>	<b>20</b>
	- Team leader having experience in conducting such study; and team member having Professional Degree/Doctorate/Masters in the field of (a) agri-business/food processing/food technologies- More weightage will be given for higher nos. of members in the team, their higher educational qualification and greater exposure/experience in such studies	
<b>D</b>	<b>Technical Presentation including Team Strength</b>	<b>40</b>



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	Detailed presentation regarding their qualifications, experience and the proposed Concept and Plan for impact evaluation study before the Evaluation cum Selection Committee on designated date.	
	- More weightage will be given to the presentations having understanding of work, shows Team Strength, precise & project-specific with Approach/Methodology to be adopted by the Consulting	
	<b>Total</b>	<b>100</b>

Only those Applicants whose Technical Proposal score 70 marks or more out of 100 marks shall qualify for further consideration.

#### **9.4 Final Empanelment of Agencies:**

After the initial selection based on the evaluation of Technical Proposals, shortlisted agencies will proceed to the next phase of the selection process. They will be invited for an interview conducted at FICSI's office in New Delhi. During this interview, additional aspects such as financial capabilities and quality considerations will be assessed.

The final interview will serve as the conclusive step in the selection process. Following a thorough evaluation of the final interviews, the agency that best meets the requirements and demonstrates the highest level of competence will be empanelled for the skill gap study.

#### **9.5 Right to reject any or all Proposals**

Notwithstanding anything contained in this RFP, the FICSI reserves the right to accept or reject any Proposal and to annul the Selection Process and reject all Proposals, at any time without any liability or any obligation for such acceptance, rejection, or annulment, and without assigning any reasons thereof.

The FICSI reserves the right to reject any Proposal if:

1. Non-Compliance with Eligibility Conditions
2. Incomplete or Inadequate Proposal
3. Non-Responsive to Bidding Documents
4. Unreasonable or Unacceptable Terms
5. Failure to Meet Format or Submission Requirement
6. Deviation from Key Objectives or Scope

## 10. Award of Study

After selection, a work order shall be issued, in duplicate, by the FICSI to the Selected consulting agency and the consulting agency shall, within 7 (seven) days of the receipt of the LOA, sign and return the duplicate copy of the LOA in acknowledgement thereof. In addition, the successful bidder will be required to sign a separate work order.

### 10.1 Submission Process:

To submit your proposal for evaluation, please follow the submission process outlined below:

Prepare all the necessary documents:

1. Documentary evidence supporting the consulting firm/expert institution's minimum five years' experience in conducting skill gap studies and research.
2. Details of two successfully completed studies related to skill gaps in the food processing industry and economic surveys/socio-economic surveys in relevant sectors.
3. Balance sheets and audited statements of account for the last three financial years to demonstrate a minimum average annual turnover of Rs. 5.00 Cr.
4. Details of the team members, their qualifications, and relevant experience.
5. A self-declaration on the agency's letterhead stating that they are not blacklisted by any Ministry/Department of the Government of India, State Governments, Organizations, or Undertakings.
6. Documentary evidence of valid GST registration and PAN number.
7. Inception report outlining the consultant's plan of action, draft questionnaire, and a timeline for conducting the study.
8. Any other necessary documents required to support the technical evaluation.
9. Covering Letter with Contact Person's Name.
10. A non-refundable processing fee of Rs 25,000 in form of a demand draft favoring "Food Industry Capacity and Skill Initiative" payable at New Delhi

Kindly ensure the compilation of all necessary documents into an organized format and forward them via email to Mr. Advait Deshpande, Senior Executive at FICSI, using the email address [advait@ficsi.in](mailto:advait@ficsi.in). Please be sure to copy Mr. Ankur Chauhan, Senior Manager at FICSI ([ankur@ficsi.in](mailto:ankur@ficsi.in)), and Mr. Sunil K Marwah, CEO at FICSI ([ceo@ficsi.in](mailto:ceo@ficsi.in)) in the email. Additionally, please take note of the requirement to **submit hard copies of all documents, including both technical and financial bids, to FICSI's office**. These hard copies in sealed condition should be sent to the following address:

Shriram Bhartiya Kala Kendra Building (3rd Floor)  
1, Copernicus Marg, New Delhi, Delhi 110001  
Attention: Mr. Ankur Chauhan.

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The details of all applicants along with the technical score sheet will be sent via email. All parties having scores of >70 will be invited for further discussions.

Please ensure that all the required documents are included and attached to the email submission. Take care to follow the submission guidelines and provide all the necessary information. We look forward to reviewing your proposal and evaluating your expertise in conducting skill gap studies and research.