Request for Proposal

Software Solution for Membership and Training Management

Feburary 11, 2026

1. Introduction

ICAP is embarking on a strategic digital transformation initiative aimed at modernizing its business applications and strengthening engagement with internal and external stakeholders. In alignment with its architectural principles—where SAP will continue to serve as the single system of record for ERP, CRM backend compliance, and master data—ICAP seeks to establish a robust system of engagement supported by scalable process orchestration layers.

Through this Request for Proposal (RFP), ICAP intends to engage a qualified software development agency to design, develop, implement, and support secure, scalable, and maintainable Python-based business applications. The selected partner will deliver fully integrated CRM UI/UX interface development and end-to-end implementation services, ensuring seamless integration with existing systems while enhancing operational efficiency, data management, and informed decision-making across the organization.

2. Objective

The objective of this Request for Proposal (RFP) is to engage a qualified software development agency to design, develop, implement, and support robust, scalable, and secure business applications for ICAP.

The selected agency will be responsible for delivering fully integrated CRM UI/UX interface development services, including requirements analysis, system design, development, testing, deployment, documentation, and post-implementation support. The engagement aims to support ICAP's digital transformation initiatives by automating business processes, improving operational efficiency, enhancing data management, and enabling informed decision-making through reliable technology solutions.

Strategic Context and Architectural Principles:

- SAP Core will remain single system of record for ERP, CRM Backend compliance and master data.
- The objective of this development is building a system of engagement with internal and external stakeholders and deployment of process orchestration layers.

The engagement will focus on developing custom Python-based applications using industry-standard frameworks and best practices, ensuring maintainability, scalability, security, and seamless integration with existing systems. Knowledge transfer and documentation will be an integral part of the assignment to ensure long-term sustainability of the developed solutions within ICAP.

3. Scope of Services

3.1 Application Design

- Analyse business requirements and functional specifications **as Key Business Requirement in Annexure I**
- Design system architecture and application workflows
- Develop database schemas and data models
- Prepare technical documentation and design diagrams

3.2 Application Development

- Develop backend applications using **Python**
- Use appropriate frameworks such as:
    - Django / Flask / FastAPI (as applicable)
- Implement:
    - Business logic
    - Role-based access control
    - Workflow automation
- Develop RESTful APIs for integration with internal and third-party systems
- Ensure secure coding practices and data protection

3.3 Frontend & Integration (if required)

- Integrate backend with frontend frameworks (React, Angular, or HTML/CSS/JS)
- Integrate applications with:
    - Databases (PostgreSQL, MySQL, SQL Server, etc.)
    - ERP, CRM, payment gateways, or third-party APIs
- Implement reporting dashboards and data visualizations
- All integrations must follow Industry API Governance frameworks such as, Open API, OAuth2.0, Versioning or similar.

3.4 Testing & Quality Assurance

- Conduct unit testing, integration testing, and system testing
- Fix bugs and performance issues
- Ensure applications meet functional and non-functional requirements

3.5 Deployment & Documentation

- Deploy applications on cloud or on-premises infrastructure
- Support containerization (Docker) if required
- Prepare:
    - User manuals
    - Technical documentation
    - Deployment guides

3.6 Maintenance & Support

- Provide post-deployment support during warranty period
- Handle bug fixes, enhancements, and performance tuning
- Assist with knowledge transfer to internal teams

3.7 Deliverables

- Requirement analysis and system design documents
- Fully functional Python-based business applications
- Source code with version control (Git)
- APIs and integration documentation
- Testing and deployment reports
- User and technical manuals

3.8 Required Skills & Experience

- Strong proficiency in **Python**
- Experience with Django / Flask / FastAPI
- Experience in business application development
- Knowledge of databases and SQL
- Familiarity with REST APIs, authentication, and security
- Experience with Git, CI/CD, and cloud deployment (preferred)

3.9 Duration & Effort

- Engagement duration: **6-8 Months**
- Resources required: Two (02) Python developers
- Working arrangement: Onsite / Hybrid

3.10 Proposal Submission Requirements

Service providers/freelancers should submit:

- Company/Freelancer profile
- Relevant experience and past projects
- CVs of proposed Python developers
- Technical approach and methodology
- Timeline and milestones
- Financial proposal (cost breakdown)

3.11 Evaluation Criteria

- Relevant experience and technical expertise
- Quality of proposed solution and approach
- Cost effectiveness
- Past performance and references
- Availability and commitment of resources

3.12 Intellectual Property

All source code, documentation, and related materials developed under this engagement shall remain the **exclusive property of ICAP**.

Knowledge transfer is an integral part of the project:

- Architecture documentation
- API documentation
- Code walkthroughs
- Shadowing and handover sessions

No phase or the project in its entirety will be considered complete without complete knowledge transfer.

4. Technical / Eligibility Criteria

Sr. No	Evaluation Area	Assessment Focus (Three Lines Only)	Weight (%)
1	**Relevant Experience**	Demonstrated experience in delivering enterprise-grade CRM UI/UX and custom business applications. Proven integration with ERP systems, preferably SAP as system of record. Experience with public sector, education, or regulatory bodies will be preferred.	30%
2	**Technical Expertise & Architecture Capability**	Strong expertise in modern industry-standard technologies, secure API integrations, and scalable architecture design. Capability to build system-of-engagement and orchestration layers aligned with SAP backend. Relevant certifications and qualified technical resources.	20%
3	**Methodology, Deliverables & Quality Assurance**	Clear and practical development methodology covering requirements to deployment. Well-defined deliverables including documentation, prototypes, and implementation roadmap. Robust QA framework including functional, performance, and security testing.	20%
4	**Project Management & Governance**	Defined governance structure with clear roles, milestones, and reporting mechanisms. Strong risk, change, and stakeholder management processes. Proven ability to manage timelines and integration dependencies effectively.	15%
5	**Training, Knowledge Transfer & Sustainability**	Comprehensive training plan for users and IT teams. Structured knowledge transfer with complete technical documentation. Clear transition strategy to ensure long-term sustainability within ICAP.	10%
6	**Financial Stability & Local Support Capability**	Evidence of stable financial performance and organizational capacity. Availability of local presence for onsite coordination and support. Defined post-implementation support model with agreed SLAs.	5%

5. Financial Proposal Submission Guidelines.

All vendors are required to submit **two sealed envelopes** as part of their response to this RFP:

- **Technical Proposal**

    The Technical Proposal must include:

    - All documents related to eligibility, technical compliance, and proposed solution design.

    - No financial information should be included in this envelope.

    - Must be clearly marked: "Technical Proposal – Solution For Membership and Training Management".

- **Financial Proposal**

    The Financial Proposal must:

    - Quote all amounts in PKR, clearly inclusive of all applicable taxes.

    - Be submitted on the firm's official letterhead, duly signed by the head of the firm or an authorized representative.

    - Include a validity period of at least 120 calendar days from the date of submission.

    - Clearly mention quoted amounts in both words and figures.

    - Mention warranty details (if applicable), highlighted in bold.

    - Ensure no overwriting, cutting, or erasing in the document.

    - Be clearly marked: "Financial Proposal – Solution For Membership and Training Management".

- **Additional Compliance Requirements**

    - The vendor must be:

        o Registered with Sales Tax and Income Tax authorities.

        o An active taxpayer, with NTN and GST registration in the firm's name (not an individual's).

    - Proposals with conditional, partial, or optional items will be rejected.

    - All applicable government taxes will be deducted from the billed amount as per law. A GST invoice must accompany the bill.

    - The quoted solution must include complete supply, delivery, and commissioning at: ICAP House, G-31, Chartered Accountants Avenue, Clifton Block 8, Karachi.

    - The Purchaser reserves the right to accept, reject, or cancel any or all bids without assigning any reason.

6. Clarification and Interpretation of the Document

The queries and clarification related to the document are to be submitted in writing to the stated address or email at imran.hafeez@icap.org.pk/ procurement@icap.org.pk . Such queries should refer to the Section, Subsection, and page number of the document.

The queries should reach ICAP by **16 February 2026** via email, post or other appropriate medium, and will be addressed/ answered by email in response time of one working day.

It should further be noted that the Institute solely reserves the right to interpret the document. The responses to such queries, clarifications and interpretations will be made in writing. No other Interpretations will be binding on the Institute.

7. Bid Document

Caution: All Vendors are requested to read this document carefully and must fulfill the mentioned requirements otherwise they will not be allowed to participate.

1. ICAP Karachi, (hereinafter referred to as "the Purchaser") invites / requests Proposals (hereinafter referred to as "the Bidders") for supply and delivery of required services.

    Queries of the Bidders seeking clarifications must be received in writing to the Purchaser within stipulated timeline. Any query received after deadline will not be entertained. ICAP Karachi may host a Q&A session, if required, at ICAP head office (Chartered Accountants Avenue Clifton block 8, Karachi). All Bidders shall be informed of the date and time in advance.

    The Contact for all correspondence in relation to this bid is as follows:

    > Primary Contact
    >
    > imran.hafeez@icap.org.pk
    >
    > 111-000-422-Ext:355
    > ICAP, Karachi
    >
    > Secondary Contact
    >
    > procurement@icap.org.pk
    >
    > 111-000-422-Ext:302
    > ICAP, Karachi.

2. Bidders should note that during the period from the receipt of the bid and until further notice from Primary Contact, all queries should be communicated via Primary Contact and in writing (e-mail) only. In the case of an urgent situation where Primary Contact cannot be contacted, the bidder may alternatively direct their enquiries through the Secondary Contact.

3. In accordance with these rules, interested Bidders applying for bids should submit two separate bids/envelopes for Financial Proposal and Technical Proposal. The envelopes shall be marked as "Financial Proposal" and "Technical Proposal" in bold and legible to avoid confusion. Initially, only the envelope marked "Technical Proposal" shall be opened. The envelope marked as "Financial Proposal" shall be retained in the custody of the ICAP Karachi without being opened.

4. ICAP Karachi shall evaluate the technical proposal in a manner prescribed in advance, without reference to the price and reject any proposal, which does not conform to the specified requirements.

5. Bidders will be solely responsible to deliver all required items/materials as well as to complete the project within the decided timeframe from all aspects.

The proposed schedule for the procurement process is as follows.

Activity	Date
RFP Advertisement ICAP Website	11 February 2026
Prospective bidders may submit questions and comments regarding RFP document by	16 February 2026
ICAP responds to questions and comments via email to all bidder(s)	16 February 2026
Bid submission	17 February 2026 latest by 3 pm
Bid Opening – Technical Bid	17 February 2026 (4 pm)
Bid Opening – Financial Bid	Financial bids will be opened after the technical qualification as per ICAP rules.

8. Project Execution Model for Implementation

- The bidders are required to furnish a relevant and detailed execution model for Solution for Membership and Management.

9. Training plan

The Implementer is required to provide training to all Users of the Institute. The purpose of the training is to fully equip the users with skills and knowledge to carry out the business processes.

Therefore, the bidders are required to submit in detail the professionally designed Training Plan Road Map at the following two levels:

a) The _User Level Training_ is mandatory part of implementation services and will be provided by the implementer to all the Users including Senior Management. The training should provide hands on learning to users to carry out day-to-day business activities and execute reports in the system.

b) The _Professional Level Training_ is to be provided to ICAP admin users in selected portals. The purpose of the training is to identify the features available in all solutions. Understand the working, processes of the solution, to be able to handle and manage the implementation services at advance level with clear understanding of solutions.

10. Payment Schedule

A payment schedule will be prepared after mutual agreement based on bid price:

a. Deliverables as per agreement/Blueprint

b. Time frame of Overall Contract Execution.

c. Successful Acceptance Test.

d. Training plan.

e. Advance payment if required will be subject to separate advance payment guarantee or mutually agreed.

f. Minimum 10% payment will be released after issuance of TOC for all modules

11. Mode of Payment

- The development, deployment and Implementation rates are to be quoted in Pak Rupees.

12. Penalty Clause

The Penalty will be imposed @10% of quoted value, if project completion timelines are not met.

13. Conditions of Contract

a. The bidder by submitting a proposal has agreed to abide by the Terms & Conditions and the Scope of work as defined in the document and is assumed to be 100% in agreement to terms and conditions floated in the document.

b. SECRECY

   a. The parties shall not at any time during or after the term of the agreement, divulge or allow to be divulged, to any person, any confidential information contractual arrangement, products, business or affairs of the parties.

   b. Notwithstanding anything contained in the paragraph, no party shall be precluded from disclosing any information to the extent required in any legal proceedings.

c. AMICABLE SETTLEMENT

   a. The parties shall use their best efforts to amicably settle all disputes arising out of or in connection with this contract or its interpretation. In case of failure to amiably resolve, the matter shall be referred to arbitration and Council of ICAP will be appointed as sole arbitrator, whose decision will be binding on both parties.
   In case of any Person/ Change of team, Firm will provide better or equal team at 'no' cost/disturbance of project.

d. PROTECTION OF ACCRUED RIGHTS

   a. The expiry or termination of this Agreement shall be without prejudice to any rights which have already accrued to either of the parties under this agreement.

e. GOVERNING LAWS:

   a. This Agreement shall be governed by and construed in accordance with Pakistan's law. The parties are entitled to amend the agreement, however, modification and amendments to this agreement shall be effective only if made in writing and signed by the parties or by their duly authorized representatives.

14. Client Reference – Successful Implementations

Sr. #	Client Name	Implementation Details	Contact Person (Name, Designation and Telephone no.)

15. Consultant/Project team Details

Sr. #	Consultant Name	Specialized Area	Firm Joining date	Total Experience in specialized area (No. of years)	Name of successful project in relevant expertise implemented

<div align="right">Annexure I</div>

Key Business Requirements *(Some business processes are in complex nature and can involve in multi-level approval workflows and multiple forms in one process.)*

3.   **Registration of Training Organization (TO)**

- TOiP
  - o   With audit
  - o   Full entitlement
  - o   Initial entitlement
  - o   Without audit
  - o   Trainees in aggregate
- TOoP
  - o   Overseas TOiP
  - o   Trainees Annually
  - o   Public Sector TO 20 Trainees aggregate
  - o   No Permanent Member employee is allowed
  - o   20 Trainee in aggregate can be inducted
- Desktop/Review of Documents Process Template

3.1 Trainee Registration

- Joining through Student portal
- Training Contract through MRS portal
  - o   As per existing scheme
  - o   3 years after passing of four CFAP Papers or 2 years gap after passing CAP
  - o   2.5 years uninterrupted training
- Six months Hardship Cases
- Fee Submission
- HOCs check with as per new scheme

3.2 Trainee Affairs

- TOIP Daily Record same in (Overseas)
- TOOP Daily Record same in (Public Sector)
- NOC with Reviews Form
- Cancellation
- Termination
- Service Break
- Form- S (with reviewed on TOIP)
- Form- S TOOP
- Form- S Overseas & Public Sector
- Leave allowance in excess of 120 days

3.3 Re-Registration of Training Contract

- After NOC/Cancellation
- Within 2 Years
- After two years to 5 years
- Rejoining after Service Break

3.4 Compliance & Counselling Reviews

- Desktop visit Report
- TO Visited Report Template

- Report Generated of Visits
- Letters to be printed in pdf & shared with TO
- Joining
- Contract
- Form- T Form S Cancellation Discontinuation Re- Registration Tos Registration
- Generation of PDF of filled form U (complete set) form Q, R, T and S and service break

3.5 Miscellaneous

- Change of TO Name/Address/MRS/Nomenclature opening of new training office
- Increase in entitlement under bye-law 104(4)
- Addition and deletion of entitlement on behalf of member employee
- Availability of Templates of sample policies which should be

3.6 Affiliate Management

- Application/Registration for becoming Professional Accounting Affiliates
- Fee Management
- Annual Subscriptions including demand letters notifications
- CPD Recording as per rule defined in Affiliates Directives

4 Membership Management

- To enroll new members and issue Membership Certificate
- To register associate members as fellow and issue Fellow Membership Certificate
- To enroll members as Life Members, Concessional Members (hardship)
- To issue duplicate certificate of membership
- To issue I-Tags (Membership Cards) to the members
- To remove and restore membership of members

4.1 Practice Firms Management

- To maintain records of Chartered Accountants firms
- Third party verification of CA firms
- Recording of induction and resignation of partners in partnership firms under Council Directive 4.03
- Updating of particulars of firms

4.2 Practicing Members Management

- To process applications and issue Certificate of Practice
- To process and issue renewal of practice certificates
- To issue duplicate certificate of membership and Certificate of Practice
- Cessation of practice under Bye Law 8 (4) of Chartered Accountant Bye Law, 1983

4.3 Fee management including Members Receivable and Advances

- To intimate and follow up for the collection of annual Membership/ Practice fee from all members
- Members Financials
- Reconciliation of Member's Advances

4.4 Certificate Inventory Management

- Stock management of the certificates / Souvenirs
- Printing of the Certificates

4.5 Continuing Professional Development

- CPD Calendar

- Registration, Attendance, Invoicing and collections
- CPD Hours Recording
- Issuance of deficiency letter

4.6 Membership Self Service

- Change Request
  - To update members' particulars with ICAP
- Continuing Professional Development (CPD) Activities
- Technical Credentials Verifications
  - To issue Good Standing Letters to members on request
  - Attestation of Membership Certificate
  - Membership Letters to Embassy
  - Visa Recommendatory Letters for the Members
  - Verification of Members requested by Third Parties
  - Issuance of Letters to the Members for Immigration Purposes
- Member Directory
  - To publish Directory of Members and Firms
- Events/ Workshop
  - Conduct Members Induction Ceremonies
  - Conduct FCAs Induction Ceremonies
  - Conferences/ Seminars

4.7 Integrations with third party application

- Payment Gateway:
  - UBL
  - Faysal Bank
  - PayPro
- SAP FICO (Finance and Controlling)