REQUEST FOR PROPOSAL

Selection of Service Providers

Export-Import Bank of India
Mumbai

November 30 2015

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REQUEST FOR PROPOSAL
RFP # EXIM/TFPE/RFP/2015/1

Title of Services
DEVELOPMENT, IMPLEMENTATION AND MAINTENANCE OF TRADE FINANCING PORTAL FOR EXPORTERS
PHASE I
Section 0. Terms of Reference

INTRODUCTION

Export-Import Bank of India (Exim Bank) was set up for the purpose of financing, facilitating and promoting foreign trade in India. It is the principal financial institution in the country for co-ordinating working of institutions engaged in financing exports and imports. Exim Bank completed 33 years of operations in March 2015.

Set up by an Act of Parliament in September 1981, the Bank commenced operations in March 1982 and is wholly owned by the Government of India.

Over the last 10 years, Exim Bank has taken several initiatives to help Indian Companies globalise their operations. Exim Bank’s current vision is to develop commercially viable relationships with a target set of externally oriented companies by offering them a comprehensive range of products and services aimed at enhancing their internationalisation efforts. Exim Bank has been pursuing its mission of enhancing Indian competitiveness by adopting a strategy that addresses the needs of Indian exporters through advisory services and research. Finance is increasingly supplemented with export-related services. Financing programmes are supplemented with advisory services based on Exim Bank’s extensive access to business information worldwide and are backed by research and analysis. The Eximius Centre for Learning with state-of-the-art facilities offers focused programmes to support institution-building efforts of companies.

For further information, visit our web-site www.eximbankindia.in

BACKGROUND

Commencing operations as a purveyor of export credit, like other Export Credit Agencies in the world, Exim Bank of India has evolved into an institution that plays a major role in partnering Indian industries, including the Small and Medium Enterprises through a wide range of products and services offered at all stages of the business cycle, starting from import of technology and export product development to export production, export marketing, pre-shipment and post-shipment and overseas investment. EXIM Bank works in close coordination with the multilateral and regional banks and financial institutions to promote trade between India and the rest of the World. As a part of Exim Bank’s objectives to promote and facilitate India’s international trade, it is proposed to design and operate a portal which would be broadly as under:

i) Knowledge & Information Portal which will inter alia contain details of trade finance products and risk mitigation measures. It can also identify the current and potential exports of a state and the eco-system required to enhance and facilitate the same. Similarly the existing / potential destination countries and the eco-system required to facilitate exports to such countries will be covered.
The Portal would include Finance/Credit Insurance options available, so that the exporter could have a choice of Finance / Insurance intermediaries. Initially Exim Bank will work closely with banks and credit insurers; and, in due course, rope in other players based on experience gained. Value-Addition (in various sectors, regions and countries) from Exim Bank to the general realm of portals could include state-level / country-level analyses, laws, regulations governing foreign trade in India and destination countries, etc.

The Portal would also encompass horizontal and vertical networking, building relationships with institutions like banks, firms providing logistics, market intelligence; and assist small and medium-sized enterprises (SME) in strengthening their managerial and administrative abilities. The portal aims to be service oriented and to act as a facilitator for making the export arena inclusive.

The objectives of the Knowledge Portal include –

a) Development of one-stop shops (for different verticals) on select sectors and allied activities with focus on value-addition as above
b) Capacity Building
c) Widening Exim Bank’s geographical market reach
d) Addition to Exim Bank’s Brand Equity

In due course, the knowledge portal can be expanded to include additional features like –

- Web-casting
- Multi-lingual content (Indian and Foreign)
- Scheduled online chats with domain experts
- Personalization
- E-Learning
- Encouraging MSME sectors for filing IPs
- Web-sites / e-mail for constituents

ii) **Helpline to the Potential and Existing Indian exporting community** in the area of India’s international trade/risk mitigation.

**Proposed Site Plan**

1. Home
2. Sector / Industry (e.g., Auto Ancillaries, Engineering Products, etc – to be prioritized). For each industry / sector / sub-sector, relevant sections, e.g., framework (e.g. Policies, Certifications, Schemes and Assistance, TradeMarks/Patents/Regulations), case studies / user videos (can be derived as moderated wiki), E-marketplace link, Benchmarking
3. States in India (Exports – Existing and Potential)
4. Country Focus
5. Export Destinations (Existing top destination countries and potential countries, if any); Also “Doing Business in” Guides; A legal guide for cross-border transaction

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6. Finance across financial intermediaries. The portal will provide a link between SMEs and financiers, enabling a greater understanding and wider opportunities for those seeking finance and those who can offer it. Direct video, audio and text communication between bank employees and customers.

7. Information related to new structures such as Cluster Based Financing, Capital Subsidy Policy for Technology Upgradation, MUDRA Bank, Credit Guarantee Schemes, Incubation Centres and start-up facilities.


9. Brand-Building, Risk Management, insights, best practices and winning strategies, strengthening MSMEs’ managerial and administrative abilities; Different Products offered by Banks; Tips in Cyber-security; Export management; Researching export markets; Supply chain management; Quality management; Packaging; Marketing and branding; Model Contracts.

10. Useful Links.

11. E-information / blogs.

12. Events.


15. Regulars like “About Us,” “Privacy Policy” “Terms of Use” “Contact Us” “Suggestions” “Site Map” “search” “Copyright” etc.

16. Login facility (registration with few details) to track visitors and visit counter.

17. Archives.

18. What’s New.

19. Big data and analytics; Use of GPS*-sensitive devices to push ideas and information to customers based on location, proximity, activity (e.g. you searched for information about a product, here’s information on leasing options). Mobile Technology could also be used.

*GPS - Global Positioning System.

20. Hear from CEOs and industry leaders/experts.

21. FAQ - Frequently asked questions.

22. Testimonials.

23. Apps (Applications).

24. Technology facilitation on cloud e.g. horizontal workloads (such as email, collaboration, Legal and HR) or vertical with industry-specific focus – Virtual infrastructure for clusters.

25. ESG (Environment, Governance and Sustainability).

26. Tapping Talent e.g. crossborder exchange.

27. Leveraging the logistics channels.

28. Training Institutions, E-Learning.

29. Credit Scorecard.

30. Facilitate electronic submission of business documents to the bank for trade financing. Enable traders and freight forwarders to apply for financial services and/or trade instruments online. Avoid paper and speed up the transaction.
DETAILS OF CURRENT REQUIREMENT

While the Portal has been envisioned as above, it is proposed to develop it in phases. In the Initial phase (to be completed in 8 weeks), the milestones include the following:

i) Design and Programming of a Knowledge Portal. The Portal would include E-Finance and Helpline to the Potential and Existing Indian exporting community in the area of India’s international trade.

ii) Testing and Operationalization of the Portal for at least one industry vertical / sector including Publicising (google keywords, etc)

iii) Designing and programming the HelpLine which would contain classification of issues / users / location / industry, etc for analysis purposes.

iv) Testing and Launch of HelpLine including Publicising (google keywords, etc). Operationalizing the HelpLine, including regular responses, analyses, and benchmarking of TAT against target. Analysis could include Tracking Repeat Calls, Corrective Action, Root Cause Analysis and Final Closure

v) Analysis of User/Portal activity, e.g. Specific Pages viewed, Time passed since previous visit, Effectiveness of content etc

vi) Facilitating optional updation of data by Exim Bank

The objective of this phase is the build the basic structure for the portal, set-up the processes for collection / building-up of the content for the portal, analysis and reporting, launch and market the portal. To elaborate further, the design will have components which include the following:

1. Home
2. Sector / Industry (e.g., Auto Ancillaries, Engineering Products, etc – to be prioritized). For each industry / sector / sub-sector, relevant sections, e.g., framework (e.g. Policies, Certifications, Schemes and Assistance, TradeMarks/Patents/Regulations), case studies / user videos (can be derived as moderated wiki), ESG (Environment, Governance and Sustainability)
3. Export Destinations (Existing top destination countries and potential countries, if any); Also “Doing Business in” Guides; A legal guide for cross-border transaction
4. Finance across financial intermediaries. The portal will provide a link between SMEs and financiers, enabling a greater understanding and wider opportunities for those seeking finance and those who can offer it. Direct video, audio and text communication between bank employees and customers.

5. Information related to new structures such as Cluster Based Financing, Capital Subsidy Policy for Technology Upgradation, MUDRA Bank, Credit Guarantee Schemes, Incubation Centres and start-up facilities
6. Credit Insurance Products / different policies / country-wise ratings / paid information
7. Useful Links
8. Events
9. Message Board
10. Moderated Discussion Forum

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11. Regulars like “About Us,” “Privacy Policy,” “Terms of Use,” “Contact Us,” “Suggestions,” “Site Map,” “search,” “Copyright,” etc.

12. Login facility (registration with few details) to track visitors and visit counter

13. What’s New

14. Hear from CEOs and industry leaders/experts

15. FAQ - Frequently asked questions

16. Testimonials.

ARCHITECTURE OF THE SOLUTION

The broad architecture of the proposed solution involves the following components:

- A mobile/browser based interface for the users to seek and provide information.
- A portal server to provide a single window interface for users for accessing the content and interaction with multiple applications.
- A Content Manager for hosting of the content and accessing the same with required security and ease.

Notes

The following points are applicable:

- The Content Sourcing Group would comprise of officers of Exim Bank and external content sourcing group. The service provider along with officers from Exim Bank (the Portal Hosting Group) would be responsible for hosting and maintenance of the portal as also to the look after the design, presentation and aesthetics of the portal.

A Steering Committee will comprise of Senior Officials of Exim Bank and representatives from the Content Sourcing Group and the Portal Hosting Group. The Steering Committee would be responsible for the over-all management of the portal.

- The application should enable remote updates, user administration and reporting without compromising security.
- **CONTENT MANAGEMENT:** The system should provide intuitive and friendly interface for content management supervised and administered by a portal administrator. The system should provide for data archival and restore by content managers through user interface. The system should also allow periodic data snapshots to be taken for audit purposes.
- Portal should have user identity management facility.
- The portal should have search functionality to query for content by keywords.
- It should be able to integrate with email server to send the alerts/reminders by email.
- It should be capable of generating general and customized reports in multiple formats.
- Security of website: Work should be done based on cyber security guidelines of Govt of India with Security Audit from CERT-IN empanelled vendor. Portal should preferably be designed in line with GIGW guidelines.
- Similarly, Application audit should be done to ensure that the functionality of the application is as specified and the said quality standard and architecture have been followed to develop the application.
Passwords should be stored in encrypted format.

SOFTWARE OWNERSHIP: All software source code, intermediate code, and executable code - backend, front-end, scripts, parameter settings, markup files, technical dictionary, message libraries and data dictionary - will become the property of Exim Bank as soon as it is handed over for testing and implementation, or loaded on any hardware owned by Exim Bank for demonstration or other purposes. Though in the normal course, Exim Bank will not change the software without notifying the service provider, it reserves the right to make any change in the software at any stage. All documentation will similarly become the property of Exim Bank as soon as it is handed over for scrutiny or acceptance. Complete source code including the elements mentioned above should be handed over to Exim Bank along with intermediate code and executable code. No program should be handed over at any stage in executable form only.

Source Code pertaining to the Portal would be the property of Exim Bank at all stages. The entire software developed under this contract shall be property item of Exim Bank and it will not under any circumstance be commercially distributed or exploited by the Service Provider in direct or modified form. The service provider should document each and every stage of the development, including the source code and hand over the source code and all the related documents to Exim Bank.

PLATFORMS: The latest versions of the platforms available at the time of starting the development work should be used. Customization / Development should be done in a manner calculated to give a reasonable assurance of upward compatibility with future versions of each platform. Portal solution should be accessible on all platforms and be compatible with popular browsers such as IE, Chrome, Firefox, Safari etc. (including on mobiles).

Audit Trail: Administrators should have access to logs for further analysis.

Scheduler for auto archival and backup of application and database.

Training and support of the system administrators.

PERFORMANCE: The system should ensure good overall performance. At no point should the users wait for the system to respond or complete its processing beyond a reasonable interval.

One year AMC after 1st year technical maintenance support: Support to address and fix any technical problems within the running system. The scope of technical support includes rectification of errors within the already developed solution and/or transferring solution from one server to another server. AMC amount should be mentioned separately.

The portal will be developed as a multilingual portal providing contents in Hindi and English in the first phase. The scope of the present project covers the following:

1. Detailed Specifications of the Portal
   - Preparation of Functional Specifications / Framework for the Portal
   - Preparation of Security Specifications (including Disaster Recovery Framework) for the Portal
   - Preparation of a roadmap of the portal covering the contents and services to be made available through it over a three years period

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3. Setting up of the Portal
   - Setting up of the site including the content manager and portal servers.
   - Design and commissioning of applications
4. Technical Documentation
   - Architecture and Detailed Design Document of the Portal
   - Administration manuals (Installation, Configuration, On line Help etc.)
   - Content Managers’ Manuals
   - Detailed technology roadmap for scaling up of Portal
5. Training of users
   - Training of users for Content Management
   - Training for Technology Group users

**Deliverables**
1. Documentation - Design Document, Data dictionary, operational instructions such as -
   - Backup, restoration and, storage of backups
   - Database tuning procedures
   - Security procedures
   - Disaster management plan
   etc
2. Portal solution, Installations and commissioning, warranty / maintenance support
3. Source code in CD/DVD
4. Testing report with security/application audit reports
5. Training including courseware and actual training for Exim Bank Administrators and the users who will train other users. The training for Trainer Administrators will include activities related to System Configuration and Administration, Content Management.
6. User Manual / Content Managers’ Manuals
   The objective of a user manual is to provide guidance to users about using the system and process to obtain help if required. The user manual will contain, besides other things, the following sub-topics:
   - Overall structure of user interfaces
   - Functional description of each user interface
   - Security features

**Project Duration**
Total duration of the project is eight weeks and one year support post Go-Live.

**Project Timeframe**
Project milestones are as under.
   - Milestone 1 – Design (Draft Specifications +Draft Framework for Collection of Data) – within 2 weeks after award of contract
   - Milestone 2 - Development of Portal – within 6 weeks after award of contract
   - Milestone 3 – Testing and Acceptance – within 7 weeks after award of contract
Milestone 4 – Security/application auditing, Training, Go-live – within 8 weeks after award of contract
Milestone 5 – Technical maintenance support – 12 months after Milestone 4.

Payment Structure

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Payment (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Milestone1</td>
<td>10%</td>
</tr>
<tr>
<td>Milestone2</td>
<td>40%</td>
</tr>
<tr>
<td>Milestone3</td>
<td>20%</td>
</tr>
<tr>
<td>Milestone4</td>
<td>20%</td>
</tr>
<tr>
<td>Milestone5</td>
<td>5%</td>
</tr>
</tbody>
</table>

Payment of balance 5% will be provided after completion of warranty period.

**Payment during AMC** (as per Financial Proposal in PR-3) after the 1st year Technical Maintenance support will be paid quarterly. Payment will be released only on submission of Invoice/Bill duly completed in all respect, certified by the authorized officer of Exim Bank.

**Third Party Tools**: In case, the service provider intends to use any third party software/tool the same has to be clearly indicated in the technical bid. The documentation of the proposed third party software/tool explaining its features and reasons supporting its use for the proposed system in comparison to the tools available in the market should be clearly indicated. The limitation of the software/tool should also be indicated clearly in the document. However, the limitations of the tool will not be treated as a limitation for development. It will be the sole responsibility of the Service Provider in case there is a violation of proprietorship of any third party software used for developing the system. The Service Provider has to bear the cost of purchasing the necessary licenses, if any, for any third party software used and is also required to bear the cost of installation of the requisite licenses for the users.

**Eligibility Criteria**

(i) The bidder firm should have been in operation during the previous 5 years in the field of software development.
(ii) The bidder firm must demonstrate that it has developed and commissioned ONE or more portal of at least comparable complexity either within or outside the country during the previous 5 years. All the applications referred by the service provider should be in use. The supporting documents for the above criteria must be submitted by the bidder.

**TERMS & CONDITIONS**

The project terms and conditions will be governed by the Agreement entered into between Exim Bank and the Service Provider after awarding the Project. A few clauses are highlighted as under:
a) The agency should not be disqualified/ blacklisted by Reserve Bank of India, Indian Bank’s Association and/or by any Government/ Government agency/ Banks/ Financial Institutions in India in the past. A declaration by the Agency to this effect is to be enclosed with the Application.

b) The service provider shall not advertise or publicly announce that he is undertaking work for Export-Import Bank of India without written consent of Export-Import Bank of India.

c) Exim Bank, without prejudice to any other remedy for breach of Contract, by written notice of default sent to the Service provider, may terminate this Contract in whole or in part, if the Service provider fails to perform any obligation(s) under the Contract. In the event of Exim Bank terminating the Contract in whole or in part, Exim Bank may procure, upon such terms and in such manner, as it deems appropriate, services similar to those undelivered, and the Service provider shall be liable to Exim Bank for any excess costs for such similar services.

d) The Service provider or any of its holding / subsidiary / joint venture / affiliate / group / client companies / or any of their employees / officers / staff / personnel / representatives / agents / shall not under any circumstances be deemed to have any employer – employee relationship with Exim Bank or any of its employees / officers / staff / representatives / personnel / agents.

e) Exim Bank shall not be responsible for providing accommodation to the Service Provider or to his representatives who will be visiting the various sites during the course of the project under this contract. However, working space, if available, may be provided on request. Exim Bank will pay no allowance or other compensation for the visits of the Service Provider or his representatives to Exim Bank’s site and for the time spent by them at Exim Bank site, for performing work covered under this contract.

f) Service Provider shall indemnify Exim Bank for loss and damages suffered due to passing on of programmes / modules / information to any other person / Agency by his partner / Agent / Servant / any person working on his behalf. The prices quoted shall include right of patent, registered design or trademark, if any. The act of submission of the bid by the bidder shall be understood to mean that the bidder undertakes to indemnify Exim Bank against all claims in respect of patents, registered designs, trademarks etc.

g) Exim Bank reserves the right to nominate a suitable inspecting / auditing agency to inspect / audit the application software supplied by the Service Provider. In the course of inspection / audit, if any deficiencies / shortfalls are noticed, it shall be the responsibility of the Service Provider to fix them to the satisfaction of the Project Coordinator. If for reasons to be specified by the inspecting authority or its nominee, any corrections or changes are found necessary, the Service Provider shall at his own cost carry out the corrections. The Service Provider however shall be entitled for extension of time to complete the contract on account of such correction.

Documents to be submitted along with Application

Documents to be submitted along with Application Form

b) Copy of PAN Card and Service Tax registration certificate

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c) Declaration by the Service Provider as stipulated in Clause related to blacklisting above under Terms and Conditions.
Section 1. Letter of Invitation

November 30, 2015

[insert: Name and Address of Service Provider]

Dear Mr./Ms.:

1. The Export-Import Bank of India invites proposals to provide the following services: DEVELOPMENT, IMPLEMENTATION AND MAINTENANCE OF TRADE FINANCING PORTAL FOR EXPORTERS - PHASE I for Export-Import Bank of India. More details on the services are provided in the Terms of Reference.

2. A firm will be selected under the Quality and Cost Based Selection Method (QCBS) and procedures described in this RFP.

3. The RFP includes the following documents:
   - Section 0 - Terms of Reference
   - Section 1 - Letter of Invitation
   - Section 2 - Instructions to Service Providers (including Data Sheet)
   - Section 3 - Technical Proposal - Standard Forms
   - Section 4 - Price Proposal - Standard Forms

Yours faithfully,

General Manager - TFPE
Export-Import Bank of India
Mumbai
Section 2. Instructions to Service Providers

Definitions

(a) “Exim Bank” means the Export-Import Bank of India.

(b) “Service Provider” means any entity or person, including a Joint Venture, Consortium or Association (JVCA), that may provide or provides the Services to Exim Bank under the Contract.

(c) “Contract” means the Contract signed by the Parties and all the attached documents listed therein, including the Conditions listed therein, and the Appendices.

(d) “Data Sheet” means such part of the Instructions to Service Providers used to reflect specific country and assignment conditions.

(e) “Day” means calendar day.

(f) “Government” means the Government of India.

(g) “Instructions to Service Providers” (Section 2 of the RFP) means the document which provides Service Providers with all information needed to prepare their Proposals.

(h) “LOI” (Section 1 of the RFP) means the Letter of Invitation.

(i) “Personnel” means professionals and support staff provided by the Service Provider or by any Sub-Contractor and assigned to perform the Services or any part thereof; “Foreign Personnel” means such professionals and support staff who at the time of being so provided had their domicile outside the Government’s country; “Local Personnel” means such professionals and support staff who at the time of being so provided had their domicile inside the Government’s country.

(j) “Proposal” means the Technical Proposal and the Price Proposal.

(k) “RFP” means the Request For Proposal prepared by Exim Bank for the selection of Service Providers.

(l) “Services” means the work to be performed by the Service Provider pursuant to the Contract.

(m) “Sub-Contractor” means any person or entity with whom the Service Provider subcontracts any part of the Services.

(n) “Terms of Reference” (TOR) means the document included in the RFP as Section 0 which explains the objectives, scope of
work, activities, tasks to be performed, respective responsibilities of Exim Bank and the Service Provider, and expected results and deliverables of the assignment.

1. Introduction

1.1 Exim Bank will select a firm/organization (the Service Provider) in accordance with the method of selection specified in the Data Sheet.

1.2 Service Providers are invited to submit a Technical Proposal and a Price Proposal, or a Technical Proposal only, as specified in the Data Sheet, for services required for the assignment named in the Data Sheet. The Proposal will be the basis for contract discussions and ultimately for a signed Contract with the selected Service Provider.

1.3 Service Providers should familiarize themselves with site conditions and take them into account in preparing their Proposals. To obtain first-hand information on the assignment and local conditions, Service Providers are encouraged to visit Exim Bank before submitting a proposal and to attend a pre-proposal conference if one is specified in the Data Sheet. Attending the pre-proposal conference is optional. Service Providers should contact Exim Bank’s representative named in the Data Sheet to arrange for their visit or to obtain additional information on the pre-proposal conference. Service Providers should ensure that these officials are advised of the visit in adequate time to allow them to make appropriate arrangements.

1.4 Exim Bank will provide at no cost to the Service Providers the inputs and facilities, as specified in the Data Sheet, needed to carry out the services.

1.5 Service Providers shall bear all costs associated with the preparation and submission of their proposals and conclusion of contract. Exim Bank is not bound to accept any proposal, and reserves the right to annul the selection process at any time prior to Contract award, without thereby incurring any liability to the Service Providers.

Conflict of Interest

1.6 Exim Bank policy requires that Service Providers provide professional, objective, and impartial advice and at all times hold the Exim Bank’s interests paramount, strictly avoid conflicts with other assignments or their own corporate interests and act without any consideration for future work.

1.6.1 Service Providers have an obligation to disclose any
situation of actual or potential conflict that impacts their capacity to serve the best interest of Exim Bank, or that may reasonably be perceived as having this effect.

1.6.2 Failure to disclose said situations may lead to the disqualification of the Service Provider or the termination of its Contract.

**Fraud and Corruption**

1.7 Exim Bank requires that all Service Providers (including their respective officers, employees and agents) adhere to the highest ethical standards, and report to Exim Bank all suspected acts of fraud or corruption of which it has knowledge or becomes aware, during the Selection Process and throughout the execution of a Contract. Fraud and corruption are prohibited.

1.8 Exim Bank will have the right to a provision to be included in the resulting contract, requiring Service Provider to permit Exim Bank to inspect its accounts and records and other documents relating to the submission of proposals and contract performance and to have them audited by auditors appointed by Exim Bank.

1.9 Service Providers shall represent and warrant:

(i) that they have read and understood Exim Bank’s prohibition against fraud and corruption and agrees to abide by the applicable rules;

(ii) that they have not engaged in any violation of policies on fraud and corruption described herein;

(iii) that they have not misrepresented or concealed any material facts during the procurement or contract discussion processes or performance of the contract;

(iv) that neither they nor any of their directors, officers or principal shareholders have been declared ineligible to be awarded Bank-financed contracts or have been convicted of a crime involving fraud or corruption;

(v) that none of their directors, officers or principal shareholders has been a director, officer or principal shareholder of any other company or
entity that has been declared ineligible to be awarded a contract by Exim Bank or has been convicted of a crime involving fraud or corruption;

(vi) that all commissions, agents’ fees, facilitating payments or revenue-sharing agreements related to the Bank-financed contract or consulting agreement have been disclosed;

Only one Proposal

1.10 Service Providers may only submit one proposal. If a Service Provider submits or participates in more than one proposal, such proposals shall be disqualified. However, this does not limit the participation of the same Sub-Contractor, including individual experts, to more than one proposal.

Proposal Validity

1.11 The Data Sheet indicates how long Service Providers’ Proposals must remain valid after the submission date. During this period, Service Providers shall maintain the availability of Professional staff nominated in the Proposal. Exim Bank will make its best effort to complete discussions within this period. Should the need arise, however, Exim Bank may request Service Providers to extend the validity period of their proposals. Service Providers who agree to such extension shall confirm that they maintain the availability of the Professional staff nominated in the Proposal, or in their confirmation of extension of validity of the Proposal, Service Providers could submit new staff in replacement, who would be considered in the final evaluation for contract award. Service Providers who do not agree have the right to refuse to extend the validity of their Proposals.

2. Clarification and Amendment of RFP Documents

2.1 Service Providers may request a clarification of any of the RFP documents up to the number of days indicated in the Data Sheet before the proposal submission date. Any request for clarification must be sent in writing, or by standard electronic means to Exim Bank’s address indicated in the Data Sheet. Exim Bank will respond in writing, or by standard electronic means (including an explanation of the query but without identifying the source of inquiry) for the benefit of all Service Providers. Should Exim Bank deem it necessary to amend the RFP as a result of a clarification, it shall do so following the procedure under para. 2.2.

2.2 At any time before the submission of Proposals, Exim Bank may amend the RFP by issuing an addendum in writing or by standard electronic means. The addendum shall be accessible
3. Preparation of Proposals

3.1 In preparing their Proposal, Service Providers are expected to examine in detail the documents comprising the RFP.

3.2 Material deficiencies in providing the information requested may result in rejection of a Proposal.

3.3 While preparing the Technical Proposal, Service Providers must give particular attention to the following:

(a) The estimated number of Professional staff-months for executing the assignment may be shown in the Data Sheet. However, the Proposal shall be based on the number of Professional staff-months or budget estimated by the Service Providers.

(b) Alternative professional staff shall not be proposed, and only one curriculum vitae (CV) may be submitted for each position.

3.4 Depending on the nature of the assignment, Service Providers are required to submit a Full Technical Proposal (FTP), or a Simplified Technical Proposal (STP). The Data Sheet indicates the format of the Technical Proposal to be submitted. Submission of the wrong type of Technical Proposal will result in the Proposal being deemed non-responsive. The Technical Proposal shall provide the information indicated in the following paragraphs from (a) to (g) using the attached Standard Forms (Section 3). Paragraph (c) (ii) indicates the recommended number of pages for the description of the approach, methodology and work plan of the STP. A page is considered to be one printed side of A4 or letter size paper.

(a) (i) For the FTP only: a brief description of the Service Providers’ organization and an outline of recent experience of the Service Providers and, in the case of JVCA, for each partner, on assignments of a similar nature is required in Form TECH-2 of Section 3. For each assignment, the outline should indicate the names of Sub-Contractors/Professional staff who participated, duration of the
assignment, contract amount, and Service Provider’s involvement. Information should be provided only for those assignments for which the Service Provider was legally contracted as a corporation or as one of the major firms within a JVCA. Assignments completed by individual Professional staff working privately or through other consulting firms cannot be claimed as the experience of the Service Provider, or that of the Service Provider’s associates, but can be claimed by the Professional staff themselves in their CVs. Service Providers should be prepared to substantiate the claimed experience if so requested by Exim Bank.

(ii) For the STP the above information is not required and Form TECH-2 of Section 3 shall not be used.

(b) (i) For the FTP only: comments and suggestions on the Terms of Reference including workable suggestions that could improve the quality/ effectiveness of the assignment (Form TECH-3 of Section 3).

(ii) For the STP Form TECH-3 of Section 3 shall not be used; the above comments and suggestions, if any, should be incorporated into the description of the approach and methodology (refer to following sub-para. 3.4 (c) (ii)).

(c) (i) For the FTP, and STP: a description of the approach, methodology and work plan for performing the assignment covering the following subjects: technical approach and methodology, work plan, and organization and staffing schedule. Guidance on the content of this section of the Technical Proposals is provided under Form TECH-4 of Section 3. The work plan should be consistent with the Work Schedule (Form TECH-7 of Section 3) which will show in the form of a bar chart the timing proposed for each activity.

(ii) For the STP only: the description of the approach, methodology and work plan should normally consist of 10 pages, including charts, diagrams, and comments and suggestions, if any, on Terms of Reference and counterpart staff and facilities.
(d) The list of the proposed Professional staff team by area of expertise, the position that would be assigned to each staff team member, and their tasks (Form TECH-5 of Section 3).

(e) Estimates of the staff input (staff-months of professionals) needed to carry out the assignment. The staff-months input should be indicated separately for home office and field activities.

(f) CVs of the Professional staff signed by the staff themselves or by the authorized representative of the Professional Staff (Form TECH-6 of Section 3).

(g) For the FTP only: a detailed description of the proposed methodology and staffing for training, if the Data Sheet specifies training as a specific component of the assignment.

3.5 The Technical Proposal shall not include any price information. A Technical Proposal containing price information may be declared non-responsive.

**Price Proposals**

3.6 The Price Proposal shall be prepared using the attached Standard Forms (Section 4). It shall list all costs associated with the assignment, including (a) remuneration for staff (in the field and at the Service Providers’ home office), and (b) miscellaneous expenses, if any. If appropriate, these costs should be broken down by activity. All activities and items described in the Technical Proposal must be priced separately; activities and items described in the Technical Proposal but not priced, shall be assumed to be included in the prices of other activities or items.

**Taxes**

3.7 The Service Provider may be subject to local taxes (such as: value added or sales tax, social charges or income taxes on non resident Personnel, duties, fees, levies) on amounts payable by Exim Bank under the Contract. Any such taxes amounts shall be indicated separately in the Price Proposal as they will not be evaluated, but they will be discussed at contract discussions, and applicable amounts will be included in the Contract.

3.8 Service Providers shall express the price of their services in Indian Rupees only.

3.9 Commissions and gratuities, if any, paid or to be paid by Service Providers and related to the assignment will be listed
Section 2. Instructions to Service Providers

3.10 Exim Bank will deduct TDS as per extant IT rules and TDS certificate will be issued to the service provider.

4. Submission, Receipt, and Opening of Proposals

4.1 The original proposal (Technical Proposal and, if required, Price Proposal; see para. 1.2) shall contain no interlineations or overwriting, except as necessary to correct errors made by the Service Providers themselves. The person who signed the proposal must initial such corrections. Submission letters for both Technical and Price Proposals should respectively be in the format of TECH-1 of Section 3, and PR-1 of Section 4.

4.2 An authorized representative of the Service Providers shall initial all pages of the original Technical and Price Proposals. The authorization shall be in the form of a written power of attorney accompanying the Proposal or in any other form demonstrating that the representative has been dully authorized to sign. The signed Technical and Price Proposals shall be marked “ORIGINAL”.

4.3 The Technical Proposal shall be marked “ORIGINAL” or “COPY” as appropriate. The Technical Proposals shall be sent to the addresses referred to in para. 4.5 and in the number of copies indicated in the Data Sheet. All required copies of the Technical Proposal are to be made from the original. If there are discrepancies between the original and the copies of the Technical Proposal, the original governs.

4.4 The original and all copies of the Technical Proposal shall be placed in a sealed envelope clearly marked “TECHNICAL PROPOSAL”. Similarly, the original Price Proposal (if required under the selection method indicated in the Data Sheet) shall be placed in a sealed envelope clearly marked “PRICE PROPOSAL” followed by the name of the assignment, and with a warning “DO NOT OPEN WITH THE TECHNICAL PROPOSAL.” The envelopes containing the Technical and Price Proposals shall be placed into an outer envelope and sealed. This outer envelope shall bear the submission address, reference number, and be clearly marked “DO NOT OPEN, EXCEPT IN PRESENCE OF THE OFFICIAL APPOINTED, BEFORE [insert the time and date of the submission deadline indicated in the Data Sheet]”. Exim Bank shall not be responsible for misplacement, losing or premature opening if the outer envelope is not sealed and/or marked as stipulated. This circumstance may be case for Proposal rejection. If the Price Proposal is not submitted in a separate sealed envelope
duly marked as indicated above, this will constitute grounds for declaring the Proposal non-responsive.

4.5 The Proposals must be sent to the address/addresses indicated in the Data Sheet and received by Exim Bank no later than the time and the date indicated in the Data Sheet, or any extension to this date in accordance with para. 2.2. Any proposal received by Exim Bank after the deadline for submission shall be returned unopened.

4.6 Exim Bank shall open the Technical Proposals in the presence of a competent authority after the deadline for their submission. The envelopes with the Price Proposal shall remain sealed and securely stored.

5. Proposal Evaluation

5.1 From the time the Proposals are opened to the time the Contract is awarded, the Service Providers should not contact Exim Bank on any matter related to its Technical and/or Price Proposal. Any effort by Service Providers to influence Exim Bank in the examination, evaluation, ranking of Proposals, and recommendation for award of Contract may result in the rejection of the Service Providers’ Proposal.

Evaluators of Technical Proposals shall have no access to the Price Proposals until the technical evaluation is concluded.

5.2 The evaluation committee shall evaluate the Technical Proposals on the basis of their responsiveness to the Terms of Reference, applying the evaluation criteria, subcriteria, and point system specified in the Data Sheet. Each responsive Proposal will be given a technical score (St). A Proposal shall be rejected at this stage if it does not respond to important aspects of the RFP, and particularly the Terms of Reference or if it fails to achieve the minimum technical score indicated in the Data Sheet.

5.3 Following the ranking of technical Proposals, when selection is based on quality only (QBS), the first ranked Service Provider is invited to discuss its proposal and the Contract in accordance with the instructions given under para. 6 of these Instructions.

5.4 After the technical evaluation is completed, Exim Bank shall notify those Service Providers whose Proposals did not meet the minimum qualifying mark or were considered non responsive to the RFP and TOR, that their Price Proposals will be returned unopened after completing the selection
LCS) process. Exim Bank shall simultaneously notify in writing Service Providers that have secured the minimum qualifying mark, the date, time and location for opening the Price Proposals. The opening date should allow Service Providers sufficient time to make arrangements for attending the opening. Service Providers’ attendance at the opening of Price Proposals is optional.

5.5 Price Proposals shall be opened publicly in the presence of the Service Providers’ representatives who choose to attend. The Price Proposal of the Service Providers who met the minimum qualifying mark will then be inspected to confirm that they have remained sealed and unopened. These Price Proposals shall be then opened, and the total prices read aloud and recorded. Copy of the record shall be sent to all Service Providers.

5.6 The Evaluation Committee will correct any arithmetical errors. When correcting arithmetical errors, in case of discrepancy between a partial amount and the total amount, or between word and figures the formers will prevail. In addition to the above corrections, as indicated under para. 3.6, activities and items described in the Technical Proposal but not priced, shall be assumed to be included in the prices of other activities or items.

5.7 In case of QCBS, the lowest evaluated Price Proposal (Pm) will be given the maximum price score (Sp) of 100 points. The price scores (Sp) of the other Price Proposals will be computed as indicated in the Data Sheet. Proposals will be ranked according to their combined technical (St) and price (Sp) scores using the weights (T = the weight given to the Technical Proposal; P = the weight given to the Price Proposal; T + P = 1) indicated in the Data Sheet: Scomb = St x T + Sp x P. The firm achieving the highest combined technical and price score will be invited for discussions.

5.8 In the case of the Least-Cost Selection, Exim Bank will select the lowest proposal among those that passed the minimum technical score. In both cases the evaluated proposal price according to para. 5.6 shall be considered, and the selected firm is invited for discussions.

6. Discussions

6.1 Discussions will be held at the date and address indicated in the Data Sheet. The invited Service Provider will, as a prerequisite for attendance at the discussions, confirm availability of all Professional staff. Failure in satisfying such
requirements may result in Exim Bank proceeding to discuss with the next-ranked Service Provider. Representatives attending discussions on behalf of the Service Provider must have written authority to discuss and conclude a Contract.

**Technical discussion**

6.2 Discussion on the Technical Proposal will include the proposed technical approach and methodology, work plan, and organization and staffing, and any suggestions made by the Service Provider to improve the Terms of Reference. Exim Bank and the Service Providers will finalize the Terms of Reference, staffing schedule, work schedule, logistics, and reporting. These documents will then be incorporated in the Contract as “Description of Services”. Special attention will be paid to clearly defining the inputs and facilities required from Exim Bank to ensure satisfactory implementation of the assignment. Exim Bank shall prepare minutes of discussion which will be signed by Exim Bank and the Service Provider.

**Price discussions**

6.3 If applicable, it is the responsibility of the Service Provider, before starting price discussion, to contact the tax authorities to determine the tax amount to be paid by the Service Provider under the Contract. The price discussion will include a clarification (if any) of the firm’s tax liability, and the manner in which it will be reflected in the Contract; and will reflect the agreed technical modifications in the cost of the services. In the cases of QCBS, and the Least-Cost Selection methods, unless there are exceptional reasons, the price discussion will involve neither the remuneration rates for staff nor other proposed unit rates. For other methods, Service Providers will provide Exim Bank with the information on remuneration rates described in the Appendix attached to Section 4 - Price Proposal - Standard Forms of this RFP.

**Availability of Professional staff/experts**

6.4 Having selected the Service Provider on the basis of, among other things, an evaluation of proposed Professional staff, Exim Bank expects to discuss a Contract on the basis of the Professional staff named in the Proposal. Before contract discussions, Exim Bank will require assurances that the Professional staff will be actually available. Exim Bank will not consider substitutions during contract discussions unless both parties agree that undue delay in the selection process makes such substitution unavoidable or for reasons such as death or medical incapacity. If this is not the case and if it is established that Professional staff were offered in the proposal without confirming their availability, the Service Provider may be disqualified. Any proposed substitute shall have
equivalent or better qualifications and experience than the original candidate and be submitted by the Service Provider within the period of time specified in the letter of invitation to discuss.

**Conclusion of the discussions** 6.5 Discussions will conclude with a review of the draft Contract. To complete discussions Exim Bank and the Service Provider will initial the agreed Contract. If discussions fail, Exim Bank will invite the Service Provider whose Proposal received the second highest score to finalize a Contract.

**7. Award of Contract** 7.1 After completing discussions Exim Bank shall award the Contract to the selected Service Provider and notify all Service Providers who have submitted proposals. After Contract signature, Exim Bank shall return the unopened Price Proposals to the unsuccessful Service Providers.

7.2 The Service Provider is expected to commence the assignment on the date and at the location specified in the **Data Sheet**.

**8. Confidentiality** 8.1 Information relating to evaluation of Proposals and recommendations concerning awards shall not be disclosed to the Service Providers who submitted the Proposals or to other persons not officially concerned with the process, until the publication of the award of Contract. The undue use by any Service Provider of confidential information related to the process may result in the rejection of its Proposal and may be subject to the provisions of Exim Bank’s antifraud and corruption policy.
# Instructions to Service Providers

## DATA SHEET

<table>
<thead>
<tr>
<th>Paragraph Reference</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Method of selection: Quality and Cost Based Selection (QCBS)</td>
</tr>
</tbody>
</table>
| 1.2                 | Price Proposal to be submitted together with Technical Proposal:  
Yes ☑  No ☐  
The complete bid will comprise of Technical and Financial bids submitted in a sealed packet. The Technical and Financial Bids would be processed separately. Hence, these bids are to be enclosed in separate sealed envelopes, clearly indicating their respective headings and then placed in the outer sealed packet. |
| 1.3                 | A pre-proposal conference cum site visit(s) * will be held:  Yes: ☑  No: ☐  
Exim Bank’s contact details:  
Address: Export-Import Bank of India, Floor 21, Centre One Building, World Trade Centre Complex, Cuffe Parade, Mumbai – 400 005.  
Telephone: (022) 2217 2601  
E-mail: sunita@eximbankindia.in |
| 1.4                 | Exim Bank will provide the following inputs and facilities:  
The following configuration will be available for the final portal setup:  
Server OS : CentOS 6.5  
Webserver : Apache  
Database : Mysql  
Frontend : PHP through Drupal  
IBM X3650 M4 server  
Any recommendations in this regard may be indicated |
1.11 Proposals must remain valid 60 days after the submission date, i.e. until 08 February 2016.

2.1 Clarifications may be requested not later than 3 days before the submission date i.e. until 7 December 2015.

The address for requesting clarifications is:

E-mail: sunita@eximbankindia.in

3.3 Prequalified Service Providers may associate with other prequalified Service Providers: __ NA

3.4 The format of the Technical Proposal to be submitted is:
Please use all forms – pertaining to both STP and FTP

3.4 (g) Training is a specific component of this assignment: Yes ☑ No __

3.7 Amounts payable by Exim Bank to the Service Provider under the contract to be subject to local taxation: Yes ☑ No __

Exim Bank will not reimburse the Service Provider for any such taxes paid by the Service Provider.

Fees quoted shall be firm and on an all inclusive basis. However, taxes shall be indicated separately in the Financial Proposal.

Exim Bank will deduct TDS as per extant IT rules and TDS certificate will be issued to the service provider.

4.3 Service Provider must submit the original and 2 copies of the Technical Proposal, and the original of the Price Proposal.

4.5 The Proposal submission address is: The General Manager (TFPE), Export-Import Bank of India, Floor 21, Centre One Building, World Trade Centre Complex, Cuffe Parade, Mumbai – 400 005.

Proposals must be submitted positively by the following date and time: 10 December 2015 – 6.00 p.m.

5.2 Criteria, sub-criteria, and point system for the evaluation are:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>(i) Specific experience of the Service Provider relevant to portal development and management of theme based portals relevant to this assignment</td>
<td>[30]</td>
</tr>
<tr>
<td>(ii) Adequacy of the proposed methodology and work plan in responding to the Terms of Reference:</td>
<td></td>
</tr>
<tr>
<td>a) Technical approach and methodology &amp; comments on TOR</td>
<td>[10]</td>
</tr>
<tr>
<td>b) Work plan &amp; schedule</td>
<td>[10]</td>
</tr>
<tr>
<td>c) Organization and staffing</td>
<td>[10]</td>
</tr>
<tr>
<td>d) Suitability of the training and the knowledge transfer program</td>
<td>[10]</td>
</tr>
<tr>
<td>(iii) Key professional staff qualifications and competence for the assignment:</td>
<td>[20]</td>
</tr>
</tbody>
</table>
(iv) Financial strength and stability of the Service Provider [10]

<table>
<thead>
<tr>
<th>Total points for the criteria: 100</th>
</tr>
</thead>
<tbody>
<tr>
<td>The minimum technical score (St) required to pass is: 75 Points</td>
</tr>
</tbody>
</table>

5.7 The formula for determining the price scores is the following:

\[ P_p = 100 \times \frac{P_m}{F} \]

in which \( P_p \) is the price score, \( P_m \) is the lowest price and \( F \) the price of the proposal under consideration.

The weights given to the Technical and Price Proposals are:

\[ T = 0.6, \text{ and} \]
\[ P = 0.4 \]

6.1 Expected date and address for contract discussion:

**December 21, 2015** at Exim Bank’s Head Office in Mumbai as specified under Sub-Clause 4.5 above.

7.2 Expected date for commencement of services

**January 1, 2016**
Section 3. Technical Proposal - Standard Forms

[Comments in brackets [ ] provide guidance to the Service Providers for the preparation of their Technical Proposals; they should not appear on the Technical Proposals to be submitted.]

Refer to Reference Paragraph 3.4 of the Data Sheet for format of Technical Proposal to be submitted, and paragraph 3.4 of Section 2 of the RFP for Standard Forms required and number of pages recommended.

Please also refer Criteria, sub-criteria, and point system for the evaluation in Para 5.2 of Data-Sheet

TECH-1 Technical Proposal Submission Form

TECH-2 Service Provider’s Organization and Experience
   A Service Provider’s Organization
   B Service Provider’s Experience

TECH-3 Comments or Suggestions on the Terms of Reference and on Counterpart Staff and Facilities to be Provided by Exim Bank
   A On the Terms of Reference
   B On the Counterpart Staff and Facilities

TECH-4 Description of the Approach, Methodology and Work Plan for Performing the Assignment

TECH-5 Team Composition and Task Assignments

TECH-6 Curriculum Vitae (CV) for Proposed Professional Staff

TECH-7 Work Schedule
FORM TECH-1 TECHNICAL PROPOSAL SUBMISSION FORM

[Location, Date]

To: [Name and address of Exim Bank]

Dear Sirs:

We, the undersigned, offer to provide the services for [Insert title of assignment] in accordance with your Request for Proposal dated [Insert Date] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal, and a Price Proposal sealed under a separate envelope.

We hereby declare that all the information and statements made in this Proposal are true and accept that any misinterpretation contained in it may lead to our disqualification.

If discussions are held during the period of validity of the Proposal, i.e., before the date indicated in Paragraph Reference 1.11 of the Data Sheet, we undertake to discuss on the basis of the proposed staff. Our Proposal is binding upon us and subject to the modifications resulting from Contract discussions.

We undertake, if our Proposal is accepted, to initiate the consulting related to the assignment not later than the date indicated in Paragraph Reference 7.2 of the Data Sheet.

We understand you are not bound to accept any Proposal you receive.

We remain,

Yours sincerely,

Authorized Signature [In full and initials]: ________________________________
Name and Title of Signatory: _____________________________________________
Name of Firm: _________________________________________________________
Address: _______________________________________________________________
FORM TECH-2 SERVICE PROVIDER’S ORGANIZATION AND EXPERIENCE

A - Service Provider’s Organization

[Provide here a brief description of the background and organization of your firm/entity and each associate for this assignment.]

At least the following Information must be provided:

1. Name of the Service Provider [Full name of the firm/company]
2. Main / Head / Corporate office
   [Full address, telephone numbers, fax numbers, and email address of the primary office of the organization]
3. Name of the CEO of the company
   [Name and full address of the Chief Executive Officer of the bidding organisation, including contact numbers and email address]
4. Dealing Office
   [i.e. the office dealing with this proposal]
   [Full address, telephone and fax numbers, and email addresses of the office of the organisation interacting with Exim Bank for this RFP]
5. Name and designation of the contact person dealing with this proposal
   [Name, designation and full address of the contact person of the dealing office, including contact numbers and email address]
6. Validity of offer, minimum period of 60 days specified
   [Validity of the offer in calendar days]
7. Number and location of offices, Number of Employees, General Experience
8. Details regarding Conflict of Interest, History of Non-Performing contracts, Pending Litigation,
9. Financial Performance for the last two years (as reflected in the financial statements enclosed)
# B - Service Provider’s Experience

[Using the format below, provide information on each assignment for which your firm, and each associate (JVCA) for this assignment, was legally contracted either individually as a corporate entity or as one of the major companies within an association, for carrying out consulting services similar to the ones requested under this assignment.]

<table>
<thead>
<tr>
<th>Assignment name:</th>
<th>Approx. value of the contract (in Rs):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country:</td>
<td>Duration of assignment (months):</td>
</tr>
<tr>
<td>Location within country:</td>
<td></td>
</tr>
<tr>
<td>Name of Client:</td>
<td>Total N^2 of staff-months of the assignment:</td>
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<tr>
<td>Address:</td>
<td>Approx. value of the services provided by your firm under the contract (in Rs.):</td>
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<tr>
<td>Start date (month/year):</td>
<td>N^2 of professional staff-months provided by associated Service Providers:</td>
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<tr>
<td>Completion date (month/year):</td>
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</tr>
<tr>
<td>Name of associated Service Providers, if any:</td>
<td>Name of senior professional staff of your firm involved and functions performed (indicate most significant profiles such as Project Director/Coordinator, Team Leader):</td>
</tr>
<tr>
<td>Narrative description of Project:</td>
<td></td>
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<tr>
<td>Description of actual services provided by your staff within the assignment:</td>
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</table>

Firm’s Name: ____________________________________________

RFP for Development, Implementation And Maintenance of Trade Financing Portal for Exporters
PHASE I
Confidential
RFP # EXIM/TFPE/RFP/2015/1
FORM TECH-3
COMMENTS AND SUGGESTIONS ON THE TERMS OF REFERENCE

[Present and justify here any modifications or improvement to the Terms of Reference you are proposing to improve performance in carrying out the assignment (such as deleting some activity you consider unnecessary, or adding another, or proposing a different phasing of the activities). Such suggestions should be concise and to the point.]
FORM TECH-4 DESCRIPTION OF APPROACH, METHODOLOGY AND WORK PLAN FOR PERFORMING THE ASSIGNMENT

a) Technical Approach and Methodology,
b) Work Plan
c) Organization and Staffing, and
d) Other clarifications such as:

What is your breakdown of work between traditional and online?
What content management systems do you use? Are they proprietary or open-source?
What has your agency done for on-site SEO on your clients’ websites?
How have you designed visitor-to-lead conversion paths on other clients’ websites?
Do you integrate marketing automation software into your website builds?
What makes you different?
FORM TECH-5 TEAM COMPOSITION AND TASK ASSIGNMENTS

<table>
<thead>
<tr>
<th>Professional Staff</th>
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<tr>
<td>Name of Staff</td>
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FORM TECH-6  CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF

1. Proposed Position  [only one candidate shall be nominated for each position]:  

2. Name of Firm  [Insert name of firm proposing the staff]:  

3. Name of Staff  [Insert full name]:  

4. Date of Birth:  

5. Education  [Indicate college/university and other specialized education of staff member, giving names of institutions, degrees obtained, and dates of obtainment]:  

6. Membership of Professional Associations:  

7. Other Training  [Indicate significant training since degrees under 5 - Education were obtained]:  

8. Languages  [For each language indicate proficiency: good, fair, or poor in speaking, reading, and writing]:  

9. Employment Record  [Starting with present position, list in reverse order every employment held by staff member since graduation, giving for each employment (see format here below): dates of employment, name of employing organization, positions held.]:

   From [Year]:  To [Year]:  
   Employer:  
   Positions held:  

10. Detailed Tasks Assigned  11. Work Undertaken that Best Illustrates Capability to Handle the Tasks Assigned

RFP for Development, Implementation And Maintenance of Trade Financing Portal for Exporters
PHASE I
Confidential  RFP # EXIM/TFPE/RFP/2015/1
<table>
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<tr>
<th>List all tasks to be performed under this assignment</th>
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[Among the assignments in which the staff has been involved, indicate the following information for those assignments that best illustrate staff capability to handle the tasks listed under point 11.]

Name of assignment or project: ___________________________
Year: ___________________________
Location: ___________________________
Client: ___________________________
Main project features: ___________________________
Positions held: ___________________________
Activities performed: ___________________________

12. Certification:

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes myself, my qualifications, and my experience. I understand that any wilful misstatement described herein may lead to my disqualification or dismissal, if engaged.

_____________________________ Date: ____________
[Signature of staff member or authorized representative of the staff] Day/Month/Year

Full name of authorized representative: ___________________________

RFP_30_11_15.doc
## Form TECH-7 Work Schedule

<table>
<thead>
<tr>
<th>N°</th>
<th>Activity (^1)</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
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1. Indicate all main activities of the assignment, including delivery of reports (e.g.: inception, weekly, and final reports), and other benchmarks such as Bank approvals. For phased assignments indicate activities, delivery of reports, and benchmarks separately for each phase.

2. Duration of activities shall be indicated in the form of a bar chart.
Section 4. Price Proposal - Standard Forms

Comments in brackets [ ] provide guidance to the Service Providers for the preparation of their Price Proposals; they should not appear on the Price Proposals to be submitted.

Price Proposal Standard Forms shall be used for the preparation of the Price Proposal according to the instructions provided under para. 3.6 of Section 2.

- PR-1 Price Proposal Submission Form
- PR-2 Summary of Price
- PR-3 Breakdown of Price by Activity
- PR-4 Breakdown of Remuneration
- PR-5 Miscellaneous expenses
FORM PR-1 PRICE PROPOSAL SUBMISSION FORM

[Location, Date]

To: [Name and address of Exim Bank]

Dear Sirs:

We, the undersigned, offer to provide the services for [Insert title of assignment] in accordance with your Request for Proposal dated [Insert Date] and our Technical Proposal. Our attached Price Proposal is for the sum of [Insert amount(s) in words and figures]. This amount is exclusive of the local taxes, which shall be identified during discussions and shall be added to the above amount.

Our Price Proposal shall be binding upon us subject to the modifications resulting from Contract discussion, up to expiration of the validity period of the Proposal, i.e. before the date indicated in Paragraph Reference 1.11 of the Data Sheet.

Commissions and gratuities paid or to be paid by us to agents relating to this Proposal and Contract execution, if we are awarded the Contract, are listed below:

<table>
<thead>
<tr>
<th>Name and Address of Agents</th>
<th>Amount</th>
<th>Purpose of Commission or Gratitude</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

We understand you are not bound to accept any Proposal you receive.

We remain,

Yours sincerely,

Authorized Signature [In full and initials]: ________________________________
Name and Title of Signatory: ___________________________________________
Name of Firm: ________________________________________________________
Address: _____________________________________________________________

1 Amounts must coincide with the ones indicated under Total Cost of Price proposal in Form PR-2.
2 If applicable, replace this paragraph with: “No commissions or gratuities have been or are to be paid by us to agents relating to this Proposal and Contract execution.”

RFP for Development, Implementation And Maintenance of Trade Financing Portal for Exporters
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## FORM PR-2 SUMMARY OF PRICES

<table>
<thead>
<tr>
<th>Costs</th>
<th>Amount(s) in Rs.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subtotal</td>
<td></td>
</tr>
<tr>
<td>Local Taxes</td>
<td></td>
</tr>
<tr>
<td>Total Amount of Financial Proposal</td>
<td>_________________</td>
</tr>
</tbody>
</table>

AMC Cost should be mentioned separately here and not included above.
### Form PR-3 Breakdown of Prices by Activity

<table>
<thead>
<tr>
<th>Activity No.:</th>
<th>Description:</th>
<th>Price Component</th>
<th>Amount(s) in Rs.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Remuneration</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Miscellaneous Expenses</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Subtotal</td>
<td></td>
</tr>
</tbody>
</table>

Subtotal: __________________________
**FORM PR-4 BREAKDOWN OF REMUNERATION**

<table>
<thead>
<tr>
<th>Activity No.</th>
<th>Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Staff Name</th>
<th>Lump sum</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Grand Total**

*Not Applicable*
**FORM PR-5 BREAKDOWN OF MISCELLANEOUS EXPENSES**

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Unit</th>
<th>Quantity</th>
<th>Unit Price (Rs.)</th>
<th>Total Amount (Rs.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
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<tr>
<td>3.</td>
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<tr>
<td>4.</td>
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<td>n.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Grand Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**RFP for Development, Implementation And Maintenance of Trade Financing Portal for Exporters**

**PHASE I**

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