



Request for Expression of Interest (EOI) For Empanelment of solution provider for Customer Relationship Management (CRM) Solution

Request For EOI Number: 02

Head Office:

**Centre One Building, 21st Floor, World Trade Centre Complex,
Cuffe Parade, Mumbai – 400 005**

1. Export-Import Bank of India [India Exim Bank] was set up in 1981 by an Act of Parliament and commenced business in March 1982. In its initial years, it engaged in vanilla ECA business, mainly medium/long term post-shipment credit for project exports, along with some packing credit and overseas investment finance. With the opening of the Indian economy, it took up finance for export capability creation, spanning export marketing, R&D, export production, export facilitation etc. Over the past decade and a half, it has also assumed the role of the GOI's policy instrument for its economic diplomacy initiatives viz. Lines of Credit, Buyer's Credit etc. Information on Bank's products & services and past financial performance can be accessed from the Bank's website: www.eximbankindia.in.
2. Exim Bank has a network of 10 Regional Offices spread across India. The Bank also has 9 overseas representative offices and one London Branch Office.
3. The Bank wants to introduce best-practices and techniques in Business Development Group (BDG) in managing customer base and lead management. With an objective to improve overall Business Performance. The new technology and practices in the areas of Customer Relationship Management CRM should enable the Bank to achieve the objectives of operational efficiency, streamlined processes, workflow automation, Management Reporting on Real Time basis and repertoire/Archives of previous engagements.
4. With this view, Exim Bank invites Expression of Interest (EOI) from bidders, which can provide Customer Relationship Management and willing to participate in bidding process for "Empanelment of solution provider for Customer Relationship Management (CRM) Solution".
5. A comprehensive and self-contained Customer Relationship Management (CRM) solution should help automate and manage the customer lifecycle for RO and BDG. The Bank aims to have consolidation of customer information into a single repository so the internal teams can better organize and manage relationships, automates common processes, and provides tools to monitor performance and productivity.
6. The CRM solution should integrate with the existing systems and Microsoft applications like SharePoint. The Data ownership will remain at Head Office. Branches/Regional Offices should be able to work on and/or upload data to / download data from CRM, with role-based access.

7. Expression of Interest (EOI) is invited in sealed envelope superscribed as [EOI – Empanelment of a solution provider for Customer Relationship Management (CRM) Solution:]

- a. From the bidders who meet the eligibility criteria as set out in Annexure 'A'
- b. Agree to abide by the terms and conditions contained in this Request for EOI document.
- c. Sealed envelope containing complete set of hard copy of EOI and a soft copy thereof (to be mailed to kiran@eximbankindia.in) should be submitted by Post to or delivered in person at the below mentioned Office:

Shri Tarun Sharma
Chief General Manager
Information Technology Group
Export-Import Bank of India
Centre One Building, Floor 21
World Trade Centre Complex
Cuffe Parade, Mumbai 400005

1. Queries on EOI

If a bidder, desiring to respond to EOI for “**Empanelment of Solution Provider for Customer Relationship Management (CRM) Solution**” to Export Import Bank of India, requires any clarifications on the points mentioned in the EOI may communicate with the Bank using the following format.

All questions received at least two days before the query meeting (query meeting will be held online i.e. on or before November 10, 2021; it will be formally responded to and questions/points of clarification and the responses will be circulated to all participating bidder if required.

The source (identity) of the bidder seeking points of clarification will not be revealed. Alternatively, India Exim Bank (referred as the Bank) may at its discretion, answer all such queries in the pre-bid meeting.

Kiran Patil kiran@eximbankindia.in Deputy General Manager – Information Technology Group
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2. Modification in Request for EOI document:

At any time prior to the last date for submission of EOIs, India Exim Bank may modify any part of this document. Such change(s) if any may be in the form of an addendum/corrigendum and will be uploaded in Exim Bank's website - <http://www.eximbankindia.in>. All such change(s) will automatically become part of this

Request for EOI and binding on all bidders. Interested bidders are advised to regularly refer the Bank's URLs as above for changes uploaded, if any.

3. Extension of date of submission of EOIs:

Request for extension of date for submission of EOIs will not be entertained. However, the Bank at its discretion may extend the date to allow prospective bidders a reasonable time to take the amendment/changes, if any, into account.

4. Format and Signing of EOI:

- i. The bidder should prepare EOI strictly as detailed in this Request for EOI document.
 - a. EOI should be typed and submitted on A4 size paper, spirally and securely bound and with all pages therein in serial numbered.
 - b. All pages of the EOI should be signed by only the authorized person(s) of the company/firm. Any interlineations, erases or overwriting shall be valid only if the person(s) signing the EOI authenticates them. The EOI should bear the rubber stamp of the bidder on each page except for the un-amendable printed literature.
 - c. Contact detail of the authorized signatory and an authorized contact person on behalf of the bidder are to be provided as under:

Particulars	Authorized signatory for signing the EOI	Authorized contact person
Name		
Designation		
Email ID		
Landline		
Mobile No.		
Fax No.		
Address		

5. Process after submission of EOIs:

- (i) All EOIs received by the designated date and time will be examined by the Bank to determine if they meet criteria/terms and conditions mentioned in this document including its subsequent amendment(s), if any and whether EOIs are complete in all respects.
- (ii) On scrutiny, the EOIs found NOT in desired format/illegible/incomplete/not containing clear information, in view of Exim Bank, to permit thorough analysis or failing to fulfil the relevant requirements will be rejected from further evaluation process.
- (iii) Exim Bank reserves the right, at any time, to waive any of the requirements of this Request for EOI document if it is deemed in the interest of Exim Bank.
- (iv) If deemed necessary, the Bank may seek clarifications on any aspect of EOI from the bidder. If a written response is requested, it must be provided within 7 days beyond which the response received, if any will not be considered. However, that would not entitle the bidder to change or cause any change in

the substances of their EOI document already submitted. The Bank may also make enquiries to establish the past performance track record of the bidders in respect of similar work. All information submitted in the application or obtained subsequently will be treated as confidential.

- (v) After examining the EOI, some or all of the bidders may be asked to make presentation of the solution and demonstrate proof of concept.
- (vi) Exim Bank may shortlist the bidders who fulfil the eligibility criteria, have solution as per the requirement of the Bank and are agreeing to abide by the terms and conditions of the Bank. Bank's judgment in this regard will be final.
- (vii) Exim Bank may issue a Request for Proposal (RFP) to shortlisted bidders for inviting technical and indicative commercial bids for next process of procurement, which is through E-Tendering. However, please note that short listing of bidders should not be treated as a contract for the proposed work.
- (viii) The bidders will be advised about shortlisting of their EOIs or otherwise. However, bidders will not be provided with information about comparative position of their EOIs with that of others.
- (ix) Nothing contained in this EOI shall impair the Bank's Right to issue 'Open Tender' on the proposed solution.

6. Terms & Conditions

- I. Lodgement of an EOI is evidence of a bidder's consent to comply with the terms and condition of Request for EOI process and subsequent bidding process. If a bidder fails to comply with any of the terms, its EOI may be summarily rejected.
- II. Wilful misrepresentation of any fact in the EOI will lead to the disqualification of the bidder without prejudice to other actions that the Bank may take. The EOI and the accompanying documents will become property of India Exim Bank. The bidders shall be deemed to license, and grant all rights to India Exim Bank, to reproduce the whole or any portion of their product/solution for the purpose of evaluation, to disclose the contents of submission to other bidders and to disclose and/ or use the contents of submission as the basis for EOI process.
- III. India Exim Bank reserves the right to accept or reject any or all EOIs received without assigning any reason thereof whatsoever and the Bank's decision in this regard will be final. No contractual obligation whatsoever shall arise from the EOI process.
- IV. Any effort on the part of the bidder to influence evaluation process may result in rejection of the EOI.
- V. India Exim Bank is not responsible for non-receipt of EOIs within the specified date and time due to any reason including postal delays or holidays in between.
- VI. India Exim Bank reserves the right to verify the validity of information provided in the EOIs and to reject any bid where the contents appear to be incorrect, inaccurate, or inappropriate at any time during the process of EOI or even after award of contract.
- VII. The bidders shall be deemed to have:

- a. examined the Request for EOI document and its subsequent changes, if any for the purpose of responding to it.
 - b. examined all circumstances and contingencies, having an effect on their EOI application and which is obtainable by the making of reasonable enquiries.
 - c. satisfied themselves as to the correctness and sufficiency of their EOI applications and if any discrepancy, error or omission is noticed in the EOI, the bidder shall notify the Bank in writing on or before the end date/time.
- VIII. The bidder shall bear all costs associated with submission of EOI, presentation/Proof of Concept (POC) desired by the Bank. The Bank will not be responsible or liable for any cost thereof, regardless of the conduct or outcome of the process.
- IX. The bidders must advise the Bank immediately in writing of any material change to the information contained in the EOI application, including any substantial change in their ownership or their financial or technical capacity. Copies of relevant documents must be submitted with their advices. For successful bidders, this requirement applies until a contract is awarded as a result of subsequent bidding process.
- X. Shortlisted bidders must not advertise or publish the same in any form without the prior written consent of India Exim Bank.
- XI. Brief overview of the proposed procurement/scope of work given in this document may be further elaborated, viz., more details may be included in the e-tender document to be issued as a result of evaluation process of EOIs.
- XII. India Exim Bank shall have the right to cancel the EOI process itself at any time, without thereby incurring any liabilities to the affected bidders. Reasons for cancellation, as determined by India Exim Bank in its sole discretion include but are not limited to, the following:
- a. Services contemplated are no longer required.
 - b. Scope of work not adequately or clearly defined due to unforeseen circumstance and/or factors and/or new developments.
 - c. The project is not in the best interest of India Exim Bank.
 - d. Any other reason.
- XIII. The selected bidders have to adhere to the implementation timelines and to the penalties for the overrun.
- XIV. The selected bidders have to get themselves annually audited by external empanelled Auditors appointed by the Bank/ inspecting official from the Reserve Bank of India or any regulatory authority, covering the risk parameters finalized by the Bank/ such auditors in the areas of products (IT hardware / software) and services etc. provided to the Bank and the bidders are required to submit such certification by such Auditors to the Bank. The Selected bidder and / or his / their outsourced agents / sub – contractors (if allowed by the Bank) shall facilitate the same. The Bank can make its expert assessment on the efficiency and effectiveness of the security, control, risk management, governance system and process created by the bidder. The bidders shall, whenever required by the Auditors, furnish all relevant information, records/data to them. All costs for such audit shall be borne by the Bank.

- XV. Where any deficiency has been observed during audit of the bidder on the risk parameters finalized by the Bank or in the certification submitted by the Auditors, the bidder shall correct/ resolve the same at the earliest and shall provide all necessary documents related to resolution thereof and the auditor shall further certify in respect of resolution of the deficiencies. The resolution provided by the bidder shall require to be certified by the Auditors covering the respective risk parameters against which such deficiencies have been observed.
- XVI. The bidders shall, whenever required by the Bank, furnish all relevant information, records/data to such auditors and/or inspecting officials of the Bank/Reserve Bank of India and or any regulatory authority. The Bank reserves the right to call and/or retain for any relevant material information / reports including audit or review reports undertaken by the bidders (e.g., financial, internal control and security reviews) and findings made on Selected bidder in conjunction with the services provided to the Bank.

Disclaimer:

India Exim Bank is not committed either contractually or in any other way to the bidders whose applications are accepted. The issue of this Request for EOI does not commit or otherwise oblige the Bank to proceed with any part or steps of the process.

Subject to any law to the contrary, and to the maximum extent permitted by law, India Exim Bank and its directors/officers/employees/contractors/agents and advisors disclaim all liabilities (including liability by reason of negligence) from any loss or damage, cost or expense incurred or arising by reasons of any person using the information and whether caused by reasons of any error, omission or misrepresentation in the information contained in this document or suffered by any person acting or refraining from acting because of any information contained in this Request for EOI document or conduct ancillary to it whether or not the loss or damage arises in connection with any omission, default, lack of care or misrepresentation on the part of India EXIM Bank or any of its officers, employees, contractors, agents or advisors.

Please Note: Since this is not a Tender or Request for Proposal (RFP), commercials are not required to be submitted at this stage

General EOI Details

EOI Document for	Empanelment of an agency for providing Customer Relationship Management (CRM) Solution.
EOI Reference No.	02
Date of Online Notice	October 27, 2021, 5:00 PM
Document Downloading Start Date	October 27, 2021, 5:00 PM
Date of pre-EOI query meeting	November 10,2021 11:00 AM-12:00 PM
Document Downloading End Date	November 17,2021, 5:00 PM
Last Date and Time For Submission	November 17,2021, 5:00 PM
Address for communication	Ph. 022-22172831 kiran@eximbankindia.in

ELIGIBILITY CRITERIA OF THE BIDDER

The applicant should clearly mention, describe their proposed solution and how it will meet the required parameters and provide details thereof in their EOI proposal on the following lines. CRM Solution providers must explicitly mention all details and must be able to seamlessly integrate with systems being used at Exim Bank.

If the solution is not able to meet some of the parameters mentioned below directly, the solution providers must explicitly mention supporting partner details and must be able to provide seamless integration to meet the parameters (Though it is not preferred, it will be examined by Exim Bank at its sole discretion, considering the individual weightage for each parameter subject to the adherence of the other terms and conditions mentioned in this EOI)

Applicant should clearly specify whether they adhere to each of the following requirements (Yes/No).

Sr. No.	Eligibility required from bidder	Compliance (Y/N)	Supporting Document enclosed (Y/N)
1.	The CRM Solution Provider should have minimum 3 years of experience as on October 01, 2021, in providing CRM solution to various reputed organizations.		Work Experience Certificate from clients.
2.	The bidder must have annual turnover of ₹50 crore each in the last three financial years, i.e., FY 2018-19, FY 2019-20 and FY 2020-21 and should have made profits (Profit After Tax, PAT would be considered) for the last 3 financial years.		Audited Balance sheet along with IT Return proof for the last 3 Financial years shall be uploaded.
3.	Successfully completed/ on-going application development and rollout projects of similar nature between FY2018-19 to FY2020-21, with - At least one project of with value not less than INR 5 Crores OR - At least two projects of with value not less than INR 2 Crores OR		Certificate of Experience as well as Work Order or Contract Agreement from clients containing scope and value of project shall be uploaded.

	- At least three projects with value not less than INR 1.5 Crores each		
4.	Product offered (CRM) has been implemented and successfully running in at least 3 banks/ financial institutions in India.		Work Experience Certificate should be submitted.
5.	Bidder should have experience in integration with Microsoft technologies like .net, SharePoint applications and CBS.		
6.	The Bidder should have (a) technical support Office(s) in Mumbai and shall by itself or tie up with local vendors at its cost to render the necessary services for the places where the Bank's Regional offices in India and representative offices abroad.		
7.	The bidder should provide necessary certifications e.g., ISO 9001, ISO 270001 etc.		Copy of valid certificates
8.	The Licenses supplied should be perpetual and cover all Employees of the Bank. The number of user Licenses should be unlimited.		Self-declaration and proof certifying the same.
9.	The bidder should preferably have offices in Metro cities.		
11.	The solution provider should have valid GST and PAN Number.		
12.	The solution provider should have a valid registration number.		
13.	The solution provider should neither be blacklisted by any government department nor there should be any criminal case registered/pending against the firm or its owner/partners anywhere in India and no intellectual or patent infringement cases are subsisting against the Bidder		Self – Declaration as per Annexure B.

14.	Licenses should allow all employees to perform any operational roles available in the system unconditionally including read / edit / view options. Licenses should also allow access of all functionalities through self-service for all employees of bank. The right to restrict the use of the application is solely at the Bank's discretion and cannot be restricted by the solution provider in any way.		Self-declaration certifying the same shall be submitted.
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Note:

- Please be informed that the bidder must fit in all the eligibility criteria requirements. Non-compliance of even one of the requirements will result in rejection of the bid(s).
- All the above criteria will be considered during evaluation of documents and will be tabulated in a marking system. The bidder must submit documentary proof for the above eligibility criterion wherever necessary.
- The discretion of Bank will be final and binding to all in respect of finalising parameters on which the bids will be analysed. The proposal will be evaluated on eligibility criteria as mentioned in the tender documents.
- All offers received will be screened and shortlisted by a Committee of the Bank based on the specified requirements and the details submitted by the bidders. All shortlisted offers will be further evaluated based on the e-tender scheduled to be released at a future date.
- India Exim Bank reserves the right to reject any or all the tenders at any stage of the tender. Canvassing in any form will disqualify the agency.

Date:

Authorised Signatory Name:

Place:

Designation:

Company Seal:

SELF-DECLARATION ON NOT BEING BLACKLISTED

(To be provided on letterhead of the firm)

I hereby certify that the above firm has not been ever blacklisted by any Central/ State Government/ Public Undertaking/ Institute and there is no criminal case registered/ pending against the firm or its owner/ partners anywhere in India.

I also certify that the above information is true and correct in every respect and, at a later date, it is found that any details provided above are incorrect, any contract given to the above firm may be summarily terminated and the firm blacklisted.

Date:

Seal:

Authorized Signatory:

Place:

Name:

Designation:

Contact Number: