

April 22, 2022

**Corrigendum 01: Pre-Bid Query Response, Modification in the E-Tender Document and Extension in Dates for Participating in E-Tender: Closed Request for Proposal (RFP) Customer Relationship Management (CRM) Solution for Export Import Bank of India (India EXIM Bank), Reference No: - EXIM/RFP/2022-23/03**

Please refer to E-Tender Reference No. EXIM/RFP/2022-23/03 for E-Tender “Closed Request for Proposal (RFP) Customer Relationship Management (CRM) Solution for Export Import Bank of India (India EXIM Bank)”, the last date for submission of Tender through E-procurement module is extended up to May 09, 2022, 02:00 P.M. pre-bid queries response is enclosed at Annexure – I and Modified E-Tender Document is enclosed at Annexure-II.

The bidders are advised to consider the following amendments/Corrigendum before submission of their bids against this tender.

The details are as follows:

Tender Reference No.	EXIM/RFP/2022-23/03
Last Date of Acceptance of E-Tender Documents- IP Agreement	May 09, 2022, 02:00 p.m.
Date & time for Bid Submission of Tender	May 09, 2022, 02:00 p.m.
Date & time for Opening of Tender	May 09, 2022, 03:00 p.m.

All other terms and conditions of the tender document will remain unchanged. The tender document is available on our website <https://www.eximbankindia.in>.

Sd/-

(Kiran Patil)

Deputy General Manager  
Information Technology Group

### Annexure - I

Sr No.	Page No.	Clause No.	Description	Clarification	Bank's response
1	15	Introduction	Exim Bank has a network of 10 Regional Offices (ROs) spread across India. The Bank also has 9 overseas representative offices and one London Branch Office	Is the proposed CRM covered only India entity or branches/ offices across the world?	Across Bank Locations
2	15	Introduction	The CRM solution should integrate with the existing systems and Microsoft applications like SharePoint.	Please provide complete list of existing/ incoming systems/ applications which will be integrated with proposed CRM system.	1. Finacle CBS (10.2.0.9) 2. Crisil RAM 3. Bank's intranet portal developed using Sharepoint 4. Crisil Early Warning System 5. HRMS
3	16	Scope of work	Analytics & Artificial Intelligence	Analytics & AI is a pretty broad area, please specify the actual need/ requirement of the bank. This is critical for overall cost/ TCO point of view as well.	Standard AI/Analytics features deployed by vendor for BFSI clients. Vendor has to include feature details in presentation
4	16	Scope of work	ETL Module for Data Integration	Is bank expecting the complete data migration (Extraction, transformation and Load) activity to perform here?	Basic ETL functionality should be there in proposed solution
5	16	Scope of work	Custom Web Portal	Kindly elaborate what is the objective and expectation here from Custom Web Portal?	Push/Pull of information with client. The portal should be customizable to meet any additional needs.
6	17	Scope of work	Performance testing needed to be completed and report need to be shared as part of the delivery. The product delivered should be having capability to run performance testing in UAT environment to ensure that each new release/customization is not having any impact on the performance of the application.	Is the performance testing done by the bank (or its partner) or bank is expecting it to done by CRM vendor?	Bank is expecting it to be done by CRM vendor.
7	18	Scope of work	The selected bidder should upgrade the application, due to the upgrade of the Platform Software OS, Middleware, DB goes out of support during the contract period without any additional cost to the Bank.	We are assuming that CRM vendor will not be responsible for maintenance and/ or upgrade of OS, Middleware, DBA etc, kindly confirm.	CRM vendor will be responsible for upgrade/maintenance/migration of CRM solution.

8	23	Delivery and installation	The application as per the purchase order specifications should be delivered in full at our Production, Pre-prod, UAT& DR, within a maximum of 6 months from the date of issuing the Purchase order.	Is bank keeping 4 months or 6 months as complete implementation timeline? Is bank open to discuss this and decide mutually with successful bidder?	The bank is open to discuss this and decide mutually with successful bidder
9	23	Delivery and installation	Vendor should install all supplied software, including OS, database, and third-party supporting software, drivers, patches, and all other required software for the smooth functioning of the application / system at Data Center.	All these items should be installed by respective vendors/ OEMs along with their maintenance and upgradation. Kindly confirm on this?	no change. Vendor is responsible for installation of required OS/DB/any third party softwares required for running of proposed solution
10	23	ELIGIBILITY CRITERIA	Preference shall be given to solutions widely used in India and for SI & Bidder who had completed the solution implementation in 3 Public/Private Sector Banks in India. Bank should be allowed to interact, and reference check these implementations.	It would be better if Bank clearly defines here how many Public or Private Banks plus number of branches to consider for this criteria.	No Change
11	26	Considerations for Proposed Hardware	Bidder also need to share the algorithms used for capacity sizing with the Bank.	In case of on-cloud (SaaS offering), bank will not be required hardware sizing, kindly confirm.	Bidder understanding is correct
12	32	Payment Terms	Payment Terms: 30% after UAT Acceptance 40% after Movement to Production 10% after successful DR DRILL conduction in Live Environment 20% after satisfactory working of solution for six months after successful implementation. Resource Cost - at end of each quarter post deployment of resource Customization Charges - After deployment in production and sign off from Bank's Team	The payment terms of the License Subscription cost are missing. However, as an std industry practice, we are assuming License Subscription Cost is 100% advance annually.	Licenses subscription cost after initial 1 year warranty will be paid 100% advance annually. For initial setup, payment will be done as per payment terms.
13	34	Technical Score Model	Successfully completed/ on-going application development and rollout projects of similar nature (CRM) in BFSI Sector between FY2018-19 to FY2020-21 (Purchase order date will be considered while calculating marks e.g., purchase order issued before April 2018 will not be considered)	It would be tough for us to share unmade PO as we have a contract/ NDA with our client and it is extremely confidential information, so how bank will ensure this criteria?	Bidder can share claint names along with client contact details (email id and mobile number) without mentioning the contract details. The Ban team will verify the details

14	50	Commercial Proposal	The licenses provided should consider internal users count as minimum 1000 and unlimited customers for arriving at solution cost either perpetual or subscription on cloud/on prim model. The Bank will not bear any cloud charges like hosting/bandwidth/firewall/ WAF etc.	Can we consider that there is a minimum user commitment from Bank as 1,000 users?	The revised minimum user limit will be considered as 300. Approximately 100 BDG and Regional and Overseas Offices. 100 Appraisal Group and Loan Monitoring Group Approximately 30 top management, 70 Support and IT
15	16	Broad Scope	Social Media Integration (Facebook, WhatsApp, Instagram etc) Plugin for Lead, Customer Service & Customer 360 Module	Does Bank have social APIs available for interfacing with social media channels?	No. The proposed solution should have capability to integrate with leading social media sites. In future , Bank may integrate CRM solution with social websites
16	67,68	Lead Module [Point 11, 27]	Ability to attach documents by CRM users for any lead.Availability of Document Repository for Lead Module to be available for CRM user's like executives/officers with keyword based content tagging and search ability	Our understanding is that Bank already has Enterprise DMS in place and new CRM will be integrating with Enterprise DMS for uploading and viewing documents. Please confirm.	Bidder understanding is correct.
17	67	Lead Module [Point 14]	Ability of auto-closure of Leads by integrating with different subsystems like CBS, BPM (Workflow Software), Third Party Applications in real time and batch mode of integration	Kindly share the details of CBS, BPM platform (Technology, Version) which needs to be interfaced with proposed CRM application	Finacle 10.2.09
18	68	Lead Module  Point 23	Ability to do text mining and NLP processing for processing leads getting created through Email Channel.	Our Understanding is that Bank has an external NLP model. The new CRM platform has to integrate with the NLP model for lead creation via Email. Kindly confirm our understanding	Bank did not have any external NLP module.Bidder has to suggest and deploy suitable model.
19	69	Lead Module  Point 31	Ability to provide system generated Next Best Action prompt on leads based on ML/AI triggers, previous interactions, lead scoring , etc.	Our Understanding is that Bank has an external AI/ML model. The new CRM platform has to integrate with the AI/ML model to display required information into CRM. Kindly confirm our understanding	Bank did not have any external AI/ML model. Bidder has to suggest and deploy suitable model.
20	69	Customer Service Management  Point 4	Ability to create Service Request from different channels like Email, SMS, Website, Social Media, IVR, Chatbot, RBI CMS Portal, or any other channel by integrating via API/DB call/Gateway protocols.	Our understanding is that Bank would be providing all necessary APIs of mentioned systems such as Chatbot, Social Media, Website, RBI CMS Portal etc. <b>Please confirm</b>	Bidder understanding is correct.

21	75	Mobility  Point 7	Ability to work offline, and then automatically synchronizes data bi directionally once a connection has been re established.	As per our understanding, Scope of Mobility is required as an extension to CRM web application and no separate deployment for Mobile APP is required. Please confirm	Bidder understanding is correct.
22				Offline capability is required only from capability perspective and not part of mandatory requirement. Also, from security standpoint Online mode is preferred. Please confirm	Bidder understanding is correct.
23				We assume that Data to be stored on Server only not Mobile App due to Data sensitivity. Please confirm	Bidder understanding is correct.
24	76	Reports/Analytical Component  Point 10	Ability to generate AI driven reports on Optimize customer and client interaction to integrate data analysis by Artificial Intelligence (AI) and Machine Learning (ML) capabilities	Our understanding is that all transactional customer data be available in the Data mart/ data lake/ DWH from multiple systems, such that proposed CRM solution only has to integrate with Data mart/ data lake/ DWH for enriching the Customer 360/ Analytics. Kindly confirm.	Bidder understanding is correct.The Bank is process of deployment of Datalake/Data mart.
25	66	General - Deployment Model		What is the preferred form of deployment strategy planned for CRM i.e. On-Premises, Private Cloud or Public cloud	On prim/SaaS
26				In case Bank is looking for cloud deployment. Who will take ownership of the Cloud? Is there any preferred cloud provider (AWS/ Azure/GCP) ? We recommend Bank to take ownership of the Cloud and provide access to CRM vendor for deployment.	In case of public or private cloud, ownership would be with the bidder.
27	79	Cloud Security  Point 5	The CRM Solution should provide a Complete CDM framework that helps to bring data (contact and account) from various sources & clean it to create a golden customer record.The CDN should also support survivorship, data quality and data management rule engine	1) Are you looking for creating CDM (Customer Data Master) framework? 2) We understand vendor is NOT expected to be gold copy for masters. i.e. vendor shall be a slave and receive masters data. vendor shall not push masters to any other system. Please confirm 3) Are you looking for separate Data Management Rule Engine? As per our understanding, Data Management is always managed outside CRM as separate application and not part of CRM. Are you looking for separate and dedicated tool for Data Management?	Bidder to propose suitable solution/workaround for CDM.

28		General - Implementation		What are the timelines which Bank is looking to go Live with CRM	Will be decided with selected bidder
29		General - Implementation		Is the project considered to be a single phase or multiple phase ? Is there any preference w.r.t phase wise / module wise implementation. Please elaborate on the same.	Will be decided with selected bidder
30		General - Implementation		<p>We understand and assume that CRM application solution activities and implementation services (Requirement gathering, development, testing support (SIT/UAT), go live) are provided by us and the remaining activities mentioned below are taken up by Customer's IT team or third party vendor's team. Please confirm if Customer's IT team or third party vendor's team can perform the following:</p> <p>A. Infrastructure Supply, Support and Maintenance  B. Security Maintenance  C. Deployment  D. Disaster Recovery and Business continuity  E. Testing:</p> <ul style="list-style-type: none"> <li>a. Application Security (VAPT)</li> <li>b. Performance Test</li> <li>c. Load/ Stress</li> <li>d. SIT</li> <li>e. UAT</li> </ul> <p>F. Customer's side integration</p> <ul style="list-style-type: none"> <li>a. Data Migration activity</li> <li>b. ETL activities</li> <li>c. Integration jobs (Any data, which has to be fetched from legacy system to staging)</li> <li>d. API/ webservice ( Any API, which need to be custom developed to integrate with core system)</li> <li>G. Training and Roll out activities</li> </ul>	<p>Bidder has to perform :Requirement gathering, development, Deployment. testing support (SIT/UAT), go live and assist Bank's team in Security Maintenance, Customer's side integration (</p> <ul style="list-style-type: none"> <li>a. Data Migration activity</li> <li>b. ETL activities</li> <li>c. Integration jobs (Any data, which has to be fetched from legacy system to staging)</li> <li>d. API/ webservice ( Any API, which need to be custom developed to integrate with core system) )</li> <li>G. Training and Roll out activities</li> </ul>

31	66	Annexure XX: Point No - 12		<b>"Availability of custom web portal from CRM Application which can be deployed in DMZ server &amp; intranet zone for Lead Creation, Complaint"</b> - Will there be any additional requirement for this in case the proposed solution is a SaaS solution?Cloud CRM application will already come with branded web screens hosted on cloud to capture the leads,service requests.	The portal should be in compliance as per RBI CSF guidelines
32	67	Annexure XXI : Point No - 11		What would be the max size of attachments ?	15 MB per attachment
33	68	Annexure XXI : Point No -18		Which email service provider is used at EXIM bank?	Office 365
34	68	Annexure XXI : Point No -26		<b>"Ability for bulk import of leads from feed file/excel file by privileged CRM users from GUI"</b> - What would be the estimated number of records to be imported?	2500
35	67	Annexure XXI : Point No -2		Could the bank confirm that the CRM tool would need to expose API's so Banks existing systems like 'Chatbot', 'Social Listening Tool', 'Customer Mobile App' can record Leads and Service Requests. "Ability to create leads in CRM from different channels like Mobile Application, SMS, Email, Social Media, Chabot, Bank's internal portal etc. through API's.	Yes
36				Could the bank confirm the current Chatbot & Social Listening Tool being used currently	As of now , these facilities were not in use/deployed.
37	68	Annexure XXI : Point No -18		Could the bank confirm the current make and version Email server being used is it Microsoft. And what is excepted in this use cases, do let us know number of email boxes that needs to be monitored.	O-365 and number of mail boxes to be monitored-10
38				Please mention the name of current in-house system which is the master of these data elements - Customers , Customer Address,, Customer Phone Numbers, Email ID etc. - Customer Contacts - Employee(i.e. Sales Reps) - Products - Leads - Opportunity Management	In house developed module in Sharepoint and Finacle CBS 10.2.0.9

39	68	27		We understand that the bank already has SharePoint, is the expectation for new solution for managing Sales Collaterals with in CRM or CRM needs to have a link to existing Share Point content "Availability of Document Repository for Lead Module to be available for CRM user's like executives/officers with keyword based content tagging and search ability."	Proposed CRM should have capabilities to manage documents as well as have an interface/api to connect with Sharepoint
40	69	69		Could the Bank confirm the implementation is for India Bankers only.	It will be used by Bank Officers placed across the Bank locations.
41	71	5		Do you have any existing system for campaign management? If yes, What are the different channels does it support? Email, SMS etc.	No
42	15	15		Give the list of complete software/system names which should be compatible for integration with CRM ?	Bidder to propose various solutions used by BFSI industry for integrating with the proposed solution
43	16	1		Please confirm if your all requirements are documented and will it be shared during start of project during requirement validation phase ?	Bidder to prepare the BRD documents
44	50	Commercial Proposal [Note Point No 5]		Please help with the breakup of users dept wise and what would be the final count for users that needs to considered for licensing	User count 300
45	73	1		Can bank users access AD login page on internet or only within banks intranet	Both
46	78	3		We understand that you have SharePoint, do you want to integrate with SharePoint or you need a new Document Management system?	Proposed CRM should have capabilities to manage documents as well as have an interface/api to connect with Sharepoint
47	74	19		Which Portal is expected to have these functionalities chat-bots, engagement engines, live-chats, video calls, & integration with document management system	Custom Web portal
48	23	Delivery and Installation		Is SI allowed to submit alternate implementation approach as the current timeline of 6 months is very aggressive. For the requirements provided	Yes



49	53	STATEMENT OF NIL DEVIATIONS		Can statement of deviations be signed along with deviations captured and mutually agreed with vendor partner? In point no. 6 of Responsibilities of bidder, vendor can furnish deviations specifying the reasons and justifying deviations.	Yes
50	77	1		Can you please confirm if Bank is having existing ETL Tool or we will have to arrange a new ETL Tool?	Curerntly, no ETL tool is in place. Propsoed solution should have basic ETL functionality or bidder can arrange any third party tool for fulfilling the requirement.
51	72	13		Could you please let us know if you have an API gateway through which we can integrate with Core Banking.	No API gateway, Bidder has to provide some orchestration layer for API integration
52	74	13		Could you please confirm Banks current API Middleware Tool "Solution shall integrate with IBM/Oracle/Leading ESB/API Connect solution for SMS, OTP Sending through Rest API's and DB calls." . That the CRM tool needs to integrate with	No API gateway, Bidder has to provide some orchestration layer for API integration
53	72	17		Could you please confirm Banks current Datawarehouse platform "Ability to share date with data ware house system/ODS."	Bank is in process of deployment of Data warehouse solution.
54	78	3		Could you let us know what is the Banks existing Document Management System CRM needs to be integrated with "Capability of Integrating with the Banks DMS ( Document Management system ) through file upload"	The Bank is using ContentVerse DMS, The proposed solution should have capabilities to connect with various solution using Rest API.
55	78	5		Could the bank share some examples on the type for Content that would be stored . "Ability to create a content Repository for all Lead Management & Service Modules.". Is it PDFS like Sales Collaterals.	PDF,JPEG
56	80	6		Could the bank let us know frequency of Calculations and Payouts.	The proposed solution should have the capability. As of now we are not using any incentive program
57	80	6		Could the bank let share with us Sample Incentive Plans or logic. To understand the complexity of the requirement	The proposed solution should have the capability. As of now we are not using any incentive program

58	12		<p><b>GENERAL CONDITIONS OF RFP 4</b></p> <p>Penalty for use of Undue influence: The Seller undertakes that he has not given, offered or promised to give, directly or indirectly, any gift, consideration, reward, commission, fees, brokerage or inducement to any person in service of the Buyer or otherwise in procuring the Contracts or forbearing to do or for having done or forborne to do any act in relation to the obtaining or execution of the present Contract or any other Contract with the Export-Import Bank of India. Giving or offering of any gift, bribe or inducement or any attempt at any such act on behalf of the Seller towards any officer/employee of the Buyer or to any other person in a position to influence any officer/employee of the Buyer for showing any favour in relation to this or any other contract, shall render the Seller to such liability/ penalty as the Buyer may deem proper, including but not limited to termination of the contract, imposition of penal damages, forfeiture of the Bank Guarantee and refund of the amounts paid by the Buyer.</p>	<p>Penalty for use of Undue influence: To the best of its knowledge, The Seller undertakes that he has not given, offered or promised to give, directly or indirectly, any gift, consideration, reward, commission, fees, brokerage or inducement to any person in service of the Buyer or otherwise in procuring the Contracts or forbearing to do or for having done or forborne to do any act in relation to the obtaining or execution of the present Contract or any other Contract with the Export-Import Bank of India. Giving or offering of any gift, bribe or inducement or any attempt at any such act on behalf of the Seller towards any officer/employee of the Buyer or to any other person in a position to influence any officer/employee of the Buyer for showing any favour in relation to this or any other contract, shall render the Seller to such liability/ penalty as the Buyer may deem proper, including but not limited to termination of the contract, imposition of penal damages, and refund of the amounts paid by the Buyer.</p>	No Change
59	12		<p><b>GENERAL CONDITIONS OF RFP 7</b></p> <p>Termination of Contract: The Buyer shall have the right to terminate this Contract in part or in full in any of the following cases:</p> <p>(a) The Seller is declared bankrupt or becomes insolvent.</p> <p>(b) The Buyer has noticed that the Seller has utilised the services of any Indian/Foreign agent in getting this contract and paid any commission to such individual/company etc.</p> <p>(c) With mutual agreement</p> <p>(d) As per decision of the Arbitration Tribunal</p>	<p>Termination of Contract: The Buyer shall have the right to terminate this Contract in part or in full in any of the following cases:</p> <p>(a) The Seller is declared bankrupt or becomes insolvent and a petition is filed against such Seller and such petition or application is not dismissed within one hundred and twenty (120) days.</p> <p>(b) The Buyer has noticed that the Seller has utilised the services of any Indian/Foreign agent in getting this contract and paid any commission to such individual/company etc.</p> <p>(c) With mutual agreement</p> <p>(d) As per decision of the Arbitration Tribunal</p>	No Change

60	13		<p><b>GENERAL CONDITIONS OF RFP 12</b></p> <p>Notices to local bodies: The Service Provider shall comply with and give all notices required under any law, rule, regulations or bye laws of parliament, state legislature or local authority relating to works.</p>	<p>The Service Provider shall comply with and give all notices required under any law, rule, regulations or bye laws of parliament, state legislature or local authority relating to works and applicable to the Vendor as the provider of IT services</p>	No Change
61	17		<p><b>SCOPE OF WORK 5</b></p> <p>Vendor should provide the detail design of the proposed solution and also should share a detailed project plan. The plan needs to cover the UAT release dates of individual features in a phased manner so that there won't be any delay in the UAT completion. Before each UAT release the detailed knowledge transfer needs to be completed by the Bidder in onsite location. After successful completion of all UAT phases, the application will be moved into Production Environment with all features after necessary audits. The application needs to be complied with all audits finding by Bank's empanelled auditor, Internal Audit, VAPT, Data Migration Audit or any other audit as required by Bank or regulator.</p>	<p>Vendor should provide the detail design of the proposed solution and also should share a detailed project plan. The plan needs to cover the UAT release dates of individual features in a phased manner so that there won't be any delay in the UAT completion. Before each UAT release the detailed knowledge transfer needs to be completed by the Bidder in onsite location. After successful completion of all UAT phases, the application will be moved into Production Environment with all features after necessary audits. The application needs to be complied with all audits finding by Bank's empanelled auditor, Internal Audit, VAPT, Data Migration Audit or any other audit as required by Bank or regulator (in case the external auditor is used for the audit then such auditor shall not be the direct competitor of the Vendor).</p>	Agreed

62	19		<p><b>Testing and Acceptance</b></p> <p>The Bank will conduct “User Acceptance Test” (UAT) under guidance, review, and supervision of the vendor to ensure that all the functionality required by the Bank as mentioned in this SCOPE OF WORK /Requirements shared with the bidder is available and is functioning accurately as per the expectations of the Bank. Consequent to UAT, if some of the functionalities, specified in this SCOPE OF WORK are not present in tune with the Bank’s expectations, the vendor shall make appropriate changes for the functioning of Solution. The following services should be provided by the vendor:</p>	<p>Testing and Acceptance</p> <p>The Bank will conduct “User Acceptance Test” (UAT) under guidance, review, and supervision of the vendor to ensure that all the functionality required by the Bank as mentioned in this SCOPE OF WORK /Requirements shared with the bidder is available and is functioning accurately as per the specifications provided in writing and as mutually agreed by the Parties <del>expectations of the Bank</del>. Consequent to UAT, if some of the functionalities, specified in this SCOPE OF WORK are not present in tune with the Bank’s expectations, the vendor shall make appropriate changes for the functioning of Solution. The following services should be provided by the vendor:</p>	No Change
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63	20		<p><b>Testing and Acceptance</b></p> <p>4. Any defects found during the tests shall be immediately rectified or resolved by the vendor at no cost to the Bank. Re-test shall be arranged by the vendor after the rectification and the re-test shall be documented. Regression testing must be done after rectification of the defects.</p>	<p>The following language shall be added:</p> <p>1. Unless otherwise agreed in the applicable Work Order, the Bank shall have 10 Business Days following the date on which the Deliverables were provided to it by the Vendor to complete the testing or review of the Deliverables (the "Acceptance Period"). If the test or review reveals that the Deliverables materially conform to the acceptance criteria defined in the Work Order, the Bank shall immediately declare acceptance of the Deliverables in writing ("Acceptance").</p> <p>2. Any defects found during the tests shall be notified by the Bank to the Vendor and Vendor shall immediately promptly rectified or resolved by the Vendor at no cost to the Bank. Re-test shall be arranged by the vendor after the rectification and the re-test shall be documented. Regression testing must be done after rectification of the defects.</p> <p>3. If no written notification of a material non-conformance/defect with the acceptance criteria is received by the Vendor within the Acceptance Period or if the Deliverables are utilized for purposes other than testing or reviewing by the Bank, the Deliverables shall be deemed accepted by the Bank.</p> <p>4. If the Bank notifies the Vendor in writing of any material non-conformance with the acceptance criteria in the Deliverables and if the Vendor is unable to remedy such material non-conformance despite several attempts (each within a reasonable cure period) to do so, the Bank's sole and exclusive remedy shall be to reject the defective Deliverables in writing and to recover from the Vendor the amount paid by the Bank to the Vendor for the defective Deliverable upon return of the defective Deliverable to the Vendor. ☐</p>	No Change
64	20		<p><b>Training and Documentation:</b></p> <p>1) The vendor needs to provide free trainings and educational materials for all items supplied, to the Bank's technical staff, on system/application administration, configuration, and entire operations of the proposed solution</p> <p>2) Training must be provided in all functional areas and should be of sufficient duration – to the User's satisfaction.</p>	<p>1. Trainings shall be conducted at the cost &amp; expense of the Bank unless otherwise agreed by the Parties</p> <p>2. Training must be provided in all functional areas and should be of sufficient duration – <del>to the User's satisfaction</del> as per the Scope of Work or terms of this Agreement.</p>	No Change

65	22		<p><b>Warranty &amp; Service:</b></p> <p>1. During the period of AMC, if the service provided by the bidder is not satisfactory, Bank reserves the right to terminate the AMC contract</p> <p>2. The support shall be given in person or through telephone and E-mail within a reasonable time. Only licensed copies of software shall be supplied and ported. Further, all software supplied shall be of latest tested proven version which is bug free and malware free. The Solution offered should have all components which are bug free, no malicious code, no covert channels, no known vulnerabilities reported and of latest stable version, which are having a 3-year clean track record.</p>	<p>1. During the period of AMC, if the service provided by the bidder all material respect with the specification set out in the Work Order during the Warranty Period. <del>is not satisfactory, Bank reserves the right to terminate the AMC contract.</del> THE VENDOR AND THE BANK AGREE THAT THE BANK'S SOLE AND EXCLUSIVE REMEDY FOR NON-CONFORMING SERVICES AND DELIVERABLES SHALL BE REPLACEMENT/RE-PERFORMANCE BY THE VENDOR, IF SUCH NON CONFORMITY IS NOTIFIED BY THE BANK TO THE VENDOR DURING THE WARRANTY PERIOD.</p> <p>2. The support shall be given in person or through telephone and E-mail within a reasonable time. Only licensed copies of software shall be supplied and ported. Further, all software supplied shall be of latest tested proven version which is bug free and malware free at the time of delivery. At the time of delivery, The Solution offered should have all components which are bug free, no malicious code, no covert channels, no known vulnerabilities reported and of latest stable version, which are having a 3-year clean track record.</p>	No Change
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66			<p><b>Missing language</b></p>	<p>the following language is missing in the Warranty clause:</p> <p>1. Warranty period is not specified. As per our standard, we provide 30 day warranty after acceptance of the Deliverable.</p> <p>2. Notwithstanding anything to the contrary in this Agreement or any Work Order, in no event shall the Vendor be responsible for any failure to perform in accordance with the requirements of this Agreement or a Work Order to the extent such failure results from: (i) the acts or omissions of the Bank or any agent, employee or contractor of the Bank; (ii) hardware, software or system failures not attributable to the Vendor's negligence; or (iii) a force majeure event as contemplated under this Agreement; (iv) change to the technical environment in which the Deliverables operate.</p> <p>3. Disclaimer is also missing Except as expressly set forth in this Agreement, the Vendor hereby disclaims all warranties and conditions, whether express, implied, statutory or otherwise, including those related to satisfactory quality, merchantability and fitness for particular purpose, with respect to the Services and Deliverables provided under this Agreement and/or Work Orders issued hereunder and all components and elements thereof. the Vendor does not represent or warrant that Services or Deliverables, including but not limited to software, will be error or bug free or that the software will function without interruption or that any of the Services or Deliverables are designed to meet the Bank's business requirements.</p>	<p>Warranty - Standard 1 year</p>
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67	24		<p><b>B. Acceptance of Application</b></p> <p>The Bank will accept the Application only after the successful conduct of acceptance testing by the Bank's Team. Application will be considered to be accepted only after the Bank issues an acceptance letter to the vendor. The said Application may be audited for risk analysis of application functionality and security features by Bank's IS Audit team or a third-party vendor appointed by the Bank, if so desired by the Bank.</p>	<p>The Bank will accept the Application only after the successful conduct of acceptance testing by the Bank's Team. Application will be considered to be accepted only after the Bank issues an acceptance letter to the vendor. The said Application may be audited for risk analysis of application functionality and security features by Bank's IS Audit team or a third-party vendor appointed by the Bank,( the Bank agrees that any third party appointed shall not be the direct competitor of the Vendor and shall be mutually agreed by the Parties) if so desired by the Bank.</p>	No Change
68	25		<p><b>C. Inspection and Tests</b></p> <p>1. Bank or its representative shall have the right to inspect and/or to test the Application to confirm their conformity to the requirements/specifications mentioned in this RFP.</p> <p>2. The inspections and test may be conducted on the premises of the vendor, at point of delivery and/or at the final destination. If conducted on the premises of the vendor all reasonable facilities and assistance, including access to documents, code and the data, shall be furnished to the inspectors at no charge to the Bank.</p> <p>3. The inspection may be conducted on the bidder proposed solution by the Bank or Bank appointed auditors at the vendor site.</p>	<p>C. Inspection and Tests</p> <p>1. Bank or its representative shall have the right to inspect and/or to test the Application to confirm their conformity to the requirements/specifications mentioned in this RFP.</p> <p>2. The inspections and test may be conducted on the premises of the vendor, at point of delivery and/or at the final destination, upon prior written notice of ten (10) business days) and at cost and expense of the Bank. If conducted on the premises of the vendor all reasonable facilities and assistance, including access to documents, code and the data, shall be furnished to the inspectors at no charge to the Bank.</p> <p>3. The inspection may be conducted on the bidder proposed solution by the Bank or Bank appointed auditors at the vendor site.</p>	No Change



69	25		<b>E. Adherence to Standards</b> The bidder should adhere to laws of land and rules, regulations and guidelines prescribed by various regulatory, statutory and Government authorities in India. The Bank & Regulators reserves the right to conduct an audit/ongoing audit of the services provided by the bidder. The Bank reserves the right to ascertain information from the Bank's and other institutions to which the bidders have rendered their services for execution of similar projects.	E. Adherence to Standards The bidder should adhere to laws of land and rules, regulations and guidelines prescribed by various regulatory, statutory and Government authorities in India applicable to the Vendor as the provider of IT Services. The Bank & Regulators reserves the right to conduct an audit/ongoing audit of the services provided by the bidder. The Bank reserves the right to ascertain information from the Bank's and other institutions to which the bidders have rendered their services for execution of similar projects.	No Change
70	26		<b>F. Security Configuration, Monitoring and Audit</b> 1. The bidder should support proactively the implementation of baseline security configurations for Application/Devices/supporting firmware/drivers/SDK in accordance with the industry best practices and Bank's Board approved baseline documents.	1. The bidder should support proactively the implementation of baseline security configurations for Application/Devices/supporting firmware/drivers/SDK in accordance with the industry generally accepted best practices and Bank's Board approved baseline documents.	No Change

71	27		<p><b>A. Termination for Default</b></p> <p>The Bank, without prejudice to any other remedy for breach of contract, by written notice of default sent to the successful bidder, may terminate this contract in whole or in part:</p> <ul style="list-style-type: none"> <li>• If the successful bidder fails to deliver any or all of the deliverables within the period(s) specified in the Contract, or within any extension thereof granted by the Bank; or;</li> <li>• If the Successful Bidder fails to perform any other obligation(s) under the contract.</li> <li>• If the Successful Bidder, in the judgment of the Bank has engaged in corrupt or fraudulent practices in competing for or in executing the Contract</li> </ul>	<p>The Bank, without prejudice to any other remedy for breach of contract, by written notice of default sent to the successful bidder, may terminate this contract in whole or in part, upon 30 days prior written notice, if such default is capable of remedy and is not remedied within the agreed period :</p> <ul style="list-style-type: none"> <li>• If the successful bidder fails to deliver any or all of the deliverables within the period(s) specified in the Contract, or within any extension thereof granted by the Bank and ; or;</li> <li>• If the Successful Bidder fails to perform any other material-obligation(s) under the contract, .</li> <li>• If the Successful Bidder, in the judgment of the Bank has engaged in corrupt or fraudulent practices in competing for or in executing the Contract</li> </ul>	No Change
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72	28		<p><b>B. Termination for Insolvency</b></p> <p>If the Bidder becomes Bankrupt or insolvent, has a receiving order issued against it, compounds with its creditors, or, if the Bidder is a corporation, a resolution is passed or order is made for its winding up (other than a voluntary liquidation for the purposes of amalgamation or reconstruction), a receiver is appointed over any part of its undertaking or assets, or if the Bidder takes or suffers any other analogous action in consequence of debt; then the Bank may, at any time, terminate the contract by giving written notice to the Bidder. If the contract is terminated by the Bank in terms of this Clause, termination will be without compensation to the Bidder, provided that such termination will not prejudice or affect any right of action or remedy which has accrued or will accrue thereafter to the Bank. In case, the termination occurs before implementation in all the locations in terms of this clause, the Bank is entitled to make its claim to the extent of the amount already paid by the Bank to the Bidder.</p>	<p>The following language shall be added:</p> <p>Any such petition or application instituted against the Vendor for Insolvency is not dismissed within one hundred and twenty (120) days</p>	No Change
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73	28		<p><b>C. Termination for convenience</b></p> <p>The Bank, by written notice sent to the Bidder, may terminate the Contract, in whole or in part, at any time at its convenience. The notice of termination shall specify that termination is for the Bank's convenience, the extent to which performance of work under the Contract is terminated and the date upon which such termination becomes effective.</p>	<p>C. Termination for convenience</p> <p>The Bank, by prior written notice of ninety (90) days sent to the Bidder, may terminate the Contract, in whole or in part, at any time at its convenience. The notice of termination shall specify that termination is for the Bank's convenience, the extent to which performance of work under the Contract is terminated and the date upon which such termination becomes effective. In the event of such termination, the Bank shall pay the Vendor all amounts due for Services rendered up to the effective date of termination including for works in progress. In cases where the Bank terminates under this section, the Bank shall pay the the Vendor further a termination for convenience fee.</p>	No Change
74	28		<p><b>E. Consequences of Termination</b></p> <p>2. In the event that the termination of the Contract is due to the expiry of the term of the Contract, a decision not to grant any (further) extension by the Bank, the Bidder herein shall be obliged to provide all such assistance to the next successor Bidder or any other person as may be required and as the Bank may specify including training, where the successor(s) is a representative/personnel of the Bank to enable the successor to adequately provide the Service(s) hereunder, even where such assistance is required to be rendered for a reasonable period that may extend beyond the term/earlier termination hereof.</p>	<p>Any such assistance by the Vendor shall be for an agreed period of time and shall be at an additional cost to the Bank</p>	No Change
75	29		<p><b>G. Termination of contract</b></p>	<p>1. The selected bidder commits a material breach of any of the terms and conditions of the bid.</p> <p>2. In addition to the cancellation of order, The Bank reserves the right to appropriate the damages from foreclosure of the Bank guarantee given by the bidder.</p>	No Change

76	32		<b>Payment Terms</b>	1. the Bank shall pay the invoices within 30 days from the receipt of invoice. If payments are delayed beyond the above payment period, the Supplier may charge an interest rate of one per cent per month. ☐	1. the Bank shall pay the invoices within 30 days from the receipt of invoice supported by sign off and work/milestone completion certificate from Bank. If payments are delayed beyond the above payment period, the Supplier may charge an interest rate of one per cent per month. ☐
77	38	Obligations of Successful Bidder	The successful bidder has to supply all the components, services and licenses to make solution complete.	Can we keep the licenses Procurement separately ? Since EY can only supply the implementation and support services. However for Licenses, MS can refer the Licensing partner. Please suggest if the clause can be amended.	No
78	Annexure XII Commercial Proposal	5	The licenses provided should consider internal users count as minimum 1000 and unlimited customers for arriving at solution cost either perpetual or subscription on cloud/on prem model. The Bank will not bear any cloud charges like hosting/bandwidth/firewall/ WAF etc	Can we have the breakup on number of users. ( Sales, Service, Contact centre, Admin, IT, Management etc)	Detailed breakup will be shared with L1 bidder.
79			On the happening of an incident/defect the maximum turnaround time should be defined in the SLA.	Please provide expected SLA details	SLA will be prepared in mutual discussion with L1 bidder
80		Delivery and Installation	The application as per the purchase order specifications should be delivered in full at our Production, Pre-prod, UAT& DR, within a maximum of 6 months from the date of issuing the Purchase order. The timelines are to strictly adhere, and any delay shall attract penalty.	Should we understand the overall expected timeline, including all project related activities, is 6 months. If yes, we would request for extended timeline to at least 15 months	Bidder can propose timelines based on proposed solution by the bidder
81	Broad Scope	1	In addition to the above modules, all other standard modules/functionalities available in the market presently suited to BFSI sector shall be proposed in the solution along with case studies, functional specification documents and other documents relevant for showcasing the same.	This point is very indefinite. Kindly elaborate what all other modules/functionalities are desired	Bidder to propose standard modules used in BFSI industry based on their deployment experience in similar organizations.

82	Broad Scope	2	The hardware, software specification, Server Side, Client Side and Network Bandwidth required for the proposed CRM solution needs to be shared by the bidder in the response.	We are proposing a SaaS based solution that does not require an on premise setup. We will provide Client Side specifications and bandwidth requirements	okay
83	Broad Scope		Bidder also need to share Deployment Model, Software Architecture diagram, Network Architecture Diagram, Schema Design , Performance Benchmark of the solution, Benchmark of Data Import process of the solution, Product Specifications (Functionality Specification Documents, Brochures, Videos' etc) , User Manual, Operations Manual, System Administrator	By manuals (user, operations and System Administrator) do you mean product manuals or Exim Bank specific solution manuals?	Product Manuals
84	Broad Scope			What format will be the training materials desired?	PDF, PPT
85	Broad Scope			Is the vendor required to provide functional and technical administrator resources? If yes, how many and for what duration?	will be decided in later stage
86	Broad Scope	5	Vendor should provide the detail design of the proposed solution and also should share a detailed project plan. The plan needs to cover the UAT release dates of individual features in a phased manner so that there won't be any delay in the UAT completion. Before each UAT release the detailed knowledge transfer needs to be completed by the Bidder in onsite location. After successful completion of all UAT phases, the application will be moved into Production Environment with all features after necessary audits. The application needs to be complied with all audits finding by Bank's empanelled auditor, Internal Audit, VAPT, Data Migration Audit or any other audit as require by Bank or regulator.	What will be the expected duration of UAT for each phase?	minimum 10 days each...duration may be extended if reported issues were not fixed by Bidder within specified timeframe and will be added to project delay
87	Broad Scope			How many users are expected to be there in each batch of UAT?	25
88	Broad Scope			Bank need to ensure availability of process champions for UAT as per agreed plan. Any delay caused due to unavailability of users for UAT shall not be binding on the vendor	okay
89	Broad Scope	10	Bidder should ensure proper coding practices are followed and static and dynamic source code review needs to be conducted.	We are proposing a SaaS based solution that will have subscription based access to the application and source code for the same is not available. We will, however, provide source code for additional development and custom coding required to fulfill Bank's requirement. Will that be acceptable by the Bank?	okay

90	Broad Scope	11	Bidder should complete the Development/Implementation of application by 4 months, if bidder is selected.	We are assuming 4 months for development only and will exclude activities like requirement gathering, documentation, testing(system, integration, performance, VAPT), UAT, training, data migration, deployment, various audits to be performed by Bank. Kindly clarify	okay
91	Training and Documentation	5	Product Certification training shall be provided by OEM mandatorily.	Exim Bank have to interact with Microsoft (OEM in our case) for product certification training	Bidder has to arrange for training for minimum 10 IT Admins.No expenses will be borne by the Bank. For additional user training, Bank will bear the extra cost required for certifications
92	Training and Documentation	6	Training should be of vendor/OEM certification level standard on the delivered solution with certification training materials.	Functional training and product certification training are two totally different and diverse subjects. Kindly elaborate the need for product certification training as well.	Functional training for Busines Users and product certification training for IT Officers
93	Training and Documentation			Which user set need to be provided product certification training?	
94	17	3	Please clarify on what is the reason for asking for SDK availability - would it be expected from us to		No
95	31	13	Source code is proprietary and Escrow setting may not be acceptable to us. Kindly clarify		okay
96	16	1	Pleas specify which solution is being used as the current CRM at EXIM Bank		In house developed module in Sharepoint and Finacle CBS 10.2.0.9
97	31	7	Onsite resources - would this need to be part of warranty/implementation in year 1, or this needs to be quoted separately as a per resource cost in commercial proposal/bill of materials		after project sign off, bidder has to dpeloy onsite resource for day to day support and co-ordination with OEM's for resolution.
98	17	12	In case the solution is hosted on Zoho's cloud, we can provide details of architecture, infra, DC/DR setup, etc.		okay
99	73	E-6	Whether Product Source code will be shared with Bank for code review and customization - Zoho Source		okay



**Closed Request for Proposal (RFP)  
Customer Relationship Management  
(CRM)  
Solution for  
Export Import Bank of India (India EXIM Bank)**

**E-Tender Reference No: EXIM/RFP/2022-23/03**

**Head Office:  
Center One Building, 21<sup>st</sup> Floor, World Trade Centre Complex,  
Cuffe Parade, Mumbai – 400 005**



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### Document Checklist

Sr No	Documents	Remark (uploaded document name/details)
1	RFP signed by authorised person on bidder's letter head	
2	Proposed solution details - Presentation	
3	Certificate of Incorporation	
4	GSTIN Registration details	
5	ANNEXURE I - INSTRUCTIONS TO BIDDERS	
6	ANNEXURE II - E-TENDERING PROCESS COMPLIANCE STATEMENT	
7	ANNEXURE III - BID SUBMISSION COVERING LETTER	
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10	ANNEXURE VI - DECLARATION FOR ACCEPTANCE OF RFP TERMS AND CONDITIONS	
11	ANNEXURE VII - DECLARATION FOR ACCEPTANCE OF SCOPE OF WORK	
12	ANNEXURE VIII - DECLARATION FOR CLEAN TRACK RECORD - 100 Rs stamp paper	
13	Annexure IX - IMPLEMENTATION METHODOLOGY - Presentation	
14	Annexure X - PAST EXPERIENCE	
15	Annexure XI - BILL OF MATERIAL	
16	Annexure XII - COMMERCIAL PROPOSAL	
17	Annexure XIII - CUSTOMER SATISFACTION CERTIFICATE - On client letter head or email	
18	Annexure XIV - ELIGIBILITY CRITERIA OF THE BIDDER	
19	Annexure XV - STATEMENT OF NIL DEVIATIONS	
20	Annexure-XVI - LETTER OF COMPETENCE FORMAT - 100 Rs stamp paper	
21	Annexure XVII - NON – DISCLOSURE AGREEMENT - 100 Rs stamp paper	
22	Annexure XVIII - INTEGRITY PACT - 500 Rs stamp paper	
23	Annexure XIX - PROPOSED SOLUTION LICENSING MODEL AND UPGRADES	
24	Annexure XX - PROPOSED SOLUTION GENERAL ARCHITECTURE DETAILS	
25	Annexure XXI - TECHNICAL COMPLIANCE	
26	Annexure XXII - PRE-BID QUERY FORMAT	

## QUOTATION BID NOTICE

Export-Import Bank of India (EXIM Bank), a corporation established under the Act Export-Import Bank of India, 1981 and having its registered office at 21st Floor, World Trade Centre Complex, Cuffe Parade, Mumbai 400 005 invites bids from eligible bidders for "Closed Request for Proposal (RFP) for Customer Relationship Management Solution for Export Import Bank of India ".

1. The mode of tendering is through e-Tendering. E-Tendering is the process by which the physical tendering activity is carried out using internet and associated technologies in a faster and secure environment.
2. Vendor registration can be done online by opening Website:  
<https://eximbankindiatenders.procuretiger.com> Click on "New Bidder Registration" link, create User Id and Password and attach your Digital certificate.
3. Tender document will be allowed for download from above web site after successful vendor registration (hard copies of the tender document will not be provided) and submission of tender document cost.

#### **4. CONTACT INFORMATION FOR E-TENDER PROCESS**

E-Procurement Technologies Limited

801 – Wall Street – II

Opposite Orient Club near Gujarat College,

Ellis Bridge, Ahmedabad – 380 006

Gujarat, India

Landline Numbers: 079 6813 6857/ 6848/ 6842/ 6820/ 6880/ 6837/ 6895

Primary Contact Numbers: - M: - 9081000427/ 09904406300

E-mail ID: nandan.v@eptl.in, fahad@eptl.in, devendra.r@eptl.in, nikhil@eptl.in

5. EXIM Bank reserves the right to accept or reject in part or full any or all the offers without assigning any reasons there for.

### GENERAL TENDER DETAILS

Tender Document for	Closed Request for Proposal (RFP) for Customer Relationship Management Solution for Export Import Bank of India
Tender Reference No.	EXIM/RFP/2022-23/03
Last date for acceptance of IP Agreement	April 27, 2022, 05:00 PM
Place of Submission of IP Agreement original document and pre bid meeting location.	Export Import Bank of India, Center One Building, 21 <sup>st</sup> Floor, World Trade Centre Complex, Cuffe Parade, Mumbai 400 005.
Date of Online Notice	April 08, 2022, 5:00 PM
Document Downloading Start Date	April 08, 2022, 5:00 PM
Pre-Bid Meeting Date	April 18, 2022, 3:00 PM
Document Downloading End Date	April 27, 2022, 5:00 PM
Last Date and Time For Submission	April 28, 2022, 2:00 PM
Opening of Tender	April 28, 2022, 3:00 PM
Address for communication	As above Ph. 022-22172831 E-Mail: <a href="mailto:kiran@eximbankindia.in">kiran@eximbankindia.in</a> <a href="mailto:mahesh.b@eximbankindia.in">mahesh.b@eximbankindia.in</a>
Place of Receipt of E-Tender	<a href="https://eximbankindiatenders.procuretiger.com">https://eximbankindiatenders.procuretiger.com</a>

**Note:** Commercial bids will be opened online only. E-Tendering is the simulation of the manual tendering process on the internet. I.e. the eligible Bidders / Service Providers can log on to the internet site specified using a unique username and password and place their Technical & Commercial bids.

The eligible Bidders will be trained by M/s e-Procurement Technologies Ltd. (Abc Procure) personnel on the methodology of submitting the bids online using a special digital signature / electronic key / password at the date and time specified. The bids placed by the Bidders are confidential and will be opened by the authorized EXIM Bank officials. No other person can gain access to the information regarding the bids, which is confidential and encrypted in nature.

**Minimum requirement for e-tender participation:**

1. Computer / Laptop with internet connection
2. Operating system – Windows 7/ Windows 10

3. Digital certificate - Class II or III, signing + Encryption, and **it should be organizational certificate only**
4. Vendor registration can be done online by opening Website: <https://eximbankindiatenders.procuretiger.com> Click on “New Bidder Registration” link, create User Id and Password and attach your Digital certificate.

For any clarification kindly contact –

E-Procurement Technologies Limited

801 – Wall Street – II

Opposite Orient Club near Gujarat College,

Ellis Bridge, Ahmedabad – 380 006

Gujarat, India

Landline Numbers: 079 6813 6857/ 6848/ 6842/ 6820/ 6880/ 6837/ 6895

Primary Contact Numbers: - M: - 9081000427/ 09904406300

E-mail ID: nandan.v@eptl.in, fahad@eptl.in, devendra.r@eptl.in, nikhil@eptl.in

**Mandatory information required for pre-qualification of the Bidder**

I/We confirm that to the best of our knowledge this information is authentic and accept that any deliberate concealment will amount to disqualification at any stage.

Contents		Particulars	Details
1. Name of the Firm			
2. Name of the Proprietor, Partners/Directors			
A (Mobile No.)			
B (Mobile No.)			
3. Office Telephone Nos.			
a.			
b.			
c.			
4. Head Office Address			
5. Email Address			
a.			
b.			
6. Year of Establishment			
7. Registration No. and Date of Registration			
8. Status of the firm (Proprietor/Partnership/Co. etc.)			
9. Name of Bankers	a.		
	b.		
10. PAN Card No.			
11. GST No.			

Seal and Signature of the document to be uploaded on the E-tender portal.

**Date :**

**Place :**

**Note :**

### INFORMATION FOR BIDDERS

1. Bids shall be submitted online only at website:  
<https://eximbankindiatenders.procuretiger.com/EPROC/>
2. The bidders can enrol themselves on the website:  
<https://eximbankindiatenders.procuretiger.com/>. Possession of a Valid Class II/III Digital Signature Certificate (DSC) in the form of smart card/e-token in the Company's name is a prerequisite for registration and participating in the bid submission activities through this web site.
3. The tenderers should have Digital Signature Certificate (DSC) for filling up the Bids. The person signing the tender documents should be authorized for submitting the online e tender.
4. Please go through the tender advertisement and the tender document carefully to understand the documents required to be submitted as part of the bid.
5. Bidder, in advance, should get ready the bid documents to be submitted as indicated in the tender document / schedule and generally, they can be in PDF / XLS / RAR / DWF/JPG formats. Bid documents may be scanned with 100 dpi with black and white option which helps in reducing size of the scanned document.
6. Please Make sure all format asked as per Sr No 4 and 5 of tender document are properly uploaded online Website for E-Procurement  
<https://eximbankindiatenders.procuretiger.com/>
7. This Invitation for Bids is open to all Original Manufacturers/ their Authorized Dealers/ vendors / suppliers to quote on their behalf for this tender as per Manufacturer's Authorization Form and Indian Agents of Foreign Principals, if any who possess the qualifying requirements as specified in the Tender. Any person signing a Tender shall submit documentary evidence that his signature on the Tender, submitted by him, is legally binding upon himself, his firm. If it is detected that the person so signing the Tender has no authority to do so, the Asst General Manager, Exim Bank may, without prejudice to other civil and criminal remedies, not consider the Tender and hold the signatory liable for all costs and damages. Bidders should not be associated, or have been associated in the past, directly or indirectly, with a firm or any of its affiliates which have been engaged by the Purchaser to provide consulting services for the preparation of the design, specifications, and other documents to be used for the procurement of the goods to be purchased under this Invitation

of Bids. The bidder or his agent must have an office in India. That the Bidder will assume total responsibility for the fault-free operation of equipment, application software, if any, and maintenance during the warranty period and provide necessary maintenance services after end of warranty period if required. Bidders who meet the criteria given above are subject to be disqualified, if they have made untrue or false representation in the forms, statements and attachments submitted in proof of the qualification requirements or have a record of poor performance, not properly completing the contract, inordinate delays in completion or financial failure, etc. The Bidder should be a manufacturer, or their dealer specifically authorized by the manufacturer to quote on their behalf of this tender as per manufacturer authorization form and Indian agents of foreign principals, if any who must have designed, manufactured, tested and supplied the equipment(s) similar to the type specified in the "Technical Specification". Such equipment must be of the most recent series/models incorporating the latest improvements in design. The models should be in successful operation for at least one year as on date of Bid Opening in India and is engaged in R&D activities.

#### **CONDITIONS FOR MICRO, SMALL AND MEDIUM ENTERPRISES (MSMEs)**

1. As per Public Procurement policy (PPP) for Micro & Small Enterprises (MSEs) Order, 2012 issued vide Gazette Notification dated 23.03.2012 by Ministry of Micro, Small and Medium Enterprises of Govt. of India, MSEs must be registered with any of the following in order to avail the benefits / preference available vide Public Procurement Policy MSEs Order, 2012.
  - a. District Industries Centers (DIC)
  - b. Khadi and Village Industries Commission (KVIC)
  - c. Khadi and Village Industries Board
  - d. Coir Board
  - e. National Small Industries Corporation (NSIC)
  - f. Directorate of Handicraft and Handloom
  - g. Any other body specified by Ministry of MSME (MoMSME)
  - h. Udyog Aadhaar Acknowledgment/ Udyog Aadhaar Memorandum issued by MoMSME.
2. MSEs participating in the tender must submit valid & authorized copy of certificate of registration with any one of the above agencies. In case of bidders submitting DIC registration certificate shall attach original notarized copy of the DIC certificate. The MSE's Bidder to note and ensure that nature of services and goods/items manufactured mentioned in MSE's certificate matches with the nature of the services and goods /items to be supplied as per



Tender.

3. The registration certificate issued from any one of the above agencies must be valid as on Bid closing date of the tender. Bidder shall ensure validity of registration certificate in case bid closing date is extended.
4. The MSMEs who have applied for registration or renewal of registration with any of the above agencies/bodies but have not obtained the valid certificate as on close date of the tender, are not eligible for exemption/preference.
5. The MSMEs registered with above mentioned agencies /bodies are exempted from payment of Earnest Money Deposit (EMD) & tender fees.

**Relaxation of Norms for Micro & Small Enterprises (MSMEs):**

- a.** Pre-qualification criteria with respect to Prior Turnover and Prior experience may be relaxed for Micro & Small Enterprises as per GOI guidelines subject to meeting of quality and technical specifications.
- b.** However, there may be circumstances like procurement of items/services related to public safety, health, critical security operations and equipment, etc., wherein EXIM Bank reserves the right to not consider relaxation of Prior Turnover and Prior Experience for Micro and Small Enterprises as per GOI guidelines.

## GENERAL CONDITIONS OF RFP

The Bidder is required to give confirmation of their acceptance of the General Conditions of the Request for Proposal mentioned below which will automatically be considered as part of the Contract concluded with the successful Bidder (i.e. Seller in the Contract) as selected by the Buyer. Failure to do so may result in rejection of the Bid submitted by the Bidder.

1. **Law:** The Contract shall be considered and made in accordance with the laws of the Republic of India. The contract shall be governed by and interpreted in accordance with the laws of the Republic of India.
2. **Effective Date of the Contract:** The contract shall come into effect on the date of signatures of both the parties on the contract (Effective Date) and shall remain valid until the completion of the obligations of the parties under the contract. The deliveries and supplies and performance of the services shall commence from the effective date of the contract.
3. **Standard Arbitration Clause:** All disputes or differences arising out of or in connection with the present contract including the one connected with the validity of the present contract, or any part thereof should be settled by bilateral discussions. Any dispute, disagreement or question arising out of or relating to this contract or relating to construction or performance (except as to any matter the decision or determination whereof is provided for by these conditions), which cannot be settled amicably, shall within sixty (60) days or such longer period as may be mutually agreed upon, from the date on which either party informs the other in writing by a notice that such dispute, disagreement or question exists, will be referred to a sole Arbitrator. Within sixty (60) days of the receipt of the said notice, an arbitrator shall be nominated in writing by the authority agreed upon by the parties. The sole Arbitrator shall have its seat in Mumbai or such other place in India as may be mutually agreed to between the parties. The arbitration proceedings shall be conducted under the Indian Arbitration and Conciliation Act, 1996 and the award of such Arbitration Tribunal shall be enforceable in Indian Courts only. Each party shall bear its own cost of preparing and presenting its case. The cost of arbitration including the fees and expenses shall be shared equally by the parties, unless otherwise awarded by the sole arbitrator. The parties shall continue to perform their respective obligations under this contract during the pendency of the arbitration proceedings except in so far as such obligations are the subject matter of the said arbitration proceedings.

*(Note - In the event of the parties deciding to refer the dispute/s for adjudication to an Arbitral Tribunal then one arbitrator each will be appointed by each party and the case will be referred to the Indian Council of Arbitration (ICADR) for nomination of the third arbitrator. The fees of the*

*arbitrator appointed by the parties shall be borne by each party and the fees of the third arbitrator, if appointed, shall be equally shared by the buyer and seller).*

4. **Penalty for use of Undue influence:** The Seller undertakes that he has not given, offered or promised to give, directly or indirectly, any gift, consideration, reward, commission, fees, brokerage or inducement to any person in service of the Buyer or otherwise in procuring the Contracts or forbearing to do or for having done or forborne to do any act in relation to the obtaining or execution of the present Contract or any other Contract with the Export-Import Bank of India. Giving or offering of any gift, bribe or inducement or any attempt at any such act on behalf of the Seller towards any officer/employee of the Buyer or to any other person in a position to influence any officer/employee of the Buyer for showing any favour in relation to this or any other contract, shall render the Seller to such liability/ penalty as the Buyer may deem proper, including but not limited to termination of the contract, imposition of penal damages, forfeiture of the Bank Guarantee and refund of the amounts paid by the Buyer.
5. **Non-disclosure of Contract documents:** Except with the written consent of the Buyer/ Seller, other party shall not disclose the contract or any provision, specification, plan, design, pattern, sample or information thereof to any third party.
6. **Liquidated Damages:** In the event of the Seller's failure to submit the Bonds, Guarantees and Documents, supply the stores/goods and conduct trials, installation of equipment, training, etc. as specified in this contract, the Buyer may, at his discretion, withhold any payment until the completion of the contract. The BUYER may also deduct from the SELLER as agreed, liquidated damages to the sum of 0.5% of the contract price of the delayed/undelivered stores/services mentioned above for every week of delay or part of a week, subject to the maximum value of the Liquidated Damages being not higher than 10% of the value of delayed stores/services.
7. **Termination of Contract:** The Buyer shall have the right to terminate this Contract in part or in full in any of the following cases:
  - (a) The Seller is declared bankrupt or becomes insolvent.
  - (b) The Buyer has noticed that the Seller has utilised the services of any Indian/Foreign agent in getting this contract and paid any commission to such individual/company etc.
  - (c) With mutual agreement
  - (d) As per decision of the Arbitration Tribunal.

8. **Notices:** Any notice required or permitted by the contract shall be written in the English language and may be delivered personally or may be sent by email, addressed to the last known address of the party to whom it is sent.
9. **Patents and other Industrial Property Rights:** The prices stated in the present Contract shall be deemed to include all amounts payable for the use of patents, copyrights, registered charges, trademarks and payments for any other industrial property rights. The Seller shall indemnify the Buyer against all claims from a third party at any time on account of the infringement of any or all the rights mentioned in the previous paragraphs, whether such claims arise in respect of manufacture or use. The Seller shall be responsible for the completion of the supplies including spares, tools, technical literature and training aggregates irrespective of the fact of infringement of the supplies, irrespective of the fact of infringement of any or all the rights mentioned above.
10. **Amendments:** No provision of present Contract shall be changed or modified in any way (including this provision) either in whole or in part except by an instrument in writing made after the date of this Contract and signed on behalf of both the parties and which expressly states to amend the present Contract.

11. **Evaluation and Comparison of Bids:**

The bidder meeting the General Eligibility Criteria will be considered for technical evaluation. The Bidder needs to comply with all the eligibility criteria. Non-compliance to any of these criteria would result in outright rejection of the Bidder's proposal. The Bidder is expected to provide proof for each of the points for eligibility evaluation.

The decision of the Bank would be final and binding on all the Bidders to this document. The Bank may accept or reject an offer without assigning any reason whatsoever. At the sole discretion and determination of the Bank, the Bank may add any other relevant criteria for evaluating the proposals received in response to this RFP. The evaluation will be a multi-stage process. The stages are:

- a. General Eligibility
- b. technical specification evaluation
- c. Commercial evaluation

12. **Notices to local bodies:**

The Service Provider shall comply with and give all notices required under any law, rule, regulations or bye laws of parliament, state legislature or local authority relating to works.

13. No Bidder shall contact the Bank on any matter relating to its Bid, from the time of the Bid opening to the time the Contract is awarded to successful bidder(s).
14. Any effort by a Bidder to influence Bank's Bid evaluation, bid comparison or contract award decisions may result in the rejection of the Bid.
15. I / We hereby declare that I / We have read and understood the above instructions for the guidance of the Tenderers. Seal and Signature of the Bidder/s not required since the document is Digitally Signed.

## **INTRODUCTION**

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](http://www.eximbankindia.in).

Exim Bank has a network of 10 Regional Offices (ROs) spread across India. The Bank also has 9 overseas representative offices and one London Branch Office.

### **OBJECTIVE OF THIS RFP:**

1. The Bank wants to introduce best-practices and techniques 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.
2. A comprehensive and self-contained Customer Relationship Management (CRM) solution should help automate and manage the customer lifecycle across the Bank. 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.
3. The CRM solution should integrate with the existing systems and Microsoft applications like SharePoint. The Data ownership will remain at Head Office. Regional Offices should be able to work on and/or upload data to / download data from CRM, with role-based access.
4. The bidder should have capability to carry out end-to-end implementation of the solution with expertise in Requirement Analysis, Solution Design, implementation, testing, deployment & maintenance of CRM Solution in BFSI industry.

## SCOPE OF WORK

The Bank prefers to have a CRM Platform which provides an Omni Channel experience in standard CRM Modules like Customer Management, Lead Management, Service Management and Campaign Management across the Bank on an integrated platform. The solution stack shall comprise of best of the breed solutions to meet and exceed the business requirements. Also, the Platform be capable of adding integrated modules with built-in workflows, reporting, dashboards etc.

### Broad Scope

1. All the features in Bank's current CRM Application has to be included in the proposed solution in the first production build. Vendor team shall prepare a Business Requirement Document after studying existing features and workflows present in the current solution so as to ensure all existing features in the new solution. Standard Modules which shall be present in the solution are

- Customer 360
- Service Request and Complaint Management
- Lead Management
- Workflow Management
- Omni Channel Management
- System shall facilitate easy integration by either providing API or capability to consume APIs. Integration to be done with different subsystems like CBS (Finacle 10), Website, Email Gateway, SMS Gateway etc.
- Reporting and Dashboard with Drilldown
- Mobile Client
- Analytics & Artificial Intelligence
- NLP Processing
- Social Media Integration (Facebook, WhatsApp, Instagram etc) Plugin for Lead, Customer Service & Customer 360 Module
- ETL Module for Data Integration
- Custom Web Portal (For Lead, Customer Service & Campaign Activity) to deploy in DMZ & Intranet Environment.
- Bilingual functionality (English and Hindi) in customer facing web portal/mobile app.

In addition to the above modules, all other standard modules/functionalities available in the market presently suited to BFSI sector shall be proposed in the solution along with case studies, functional specification documents and other documents relevant for showcasing the same.

2. The hardware, software specification, Server Side, Client Side and Network Bandwidth required for the proposed CRM solution needs to be shared by the bidder in the response. Bidder also need to share Deployment Model, Software Architecture diagram, Network Architecture Diagram, Schema Design , Performance Benchmark of the solution, Benchmark of Data Import process of the solution,

Product Specifications (Functionality Specification Documents, Brochures, Videos' etc) , User Manual, Operations Manual, System Administrator Manuals, Training Materials for end users, Functional Administrators and Technical Administrators, Case Studies of the proposed version of the software & USP of the proposed solution.

3. Bidder shall provide the details of SDK capability with available for the solution for customization/production configuration.

4. Vendor shall provide response to Detailed Functional & Technical Requirements specified On **Annexure-XX**.

5. Vendor should provide the detail design of the proposed solution and also should share a detailed project plan. The plan needs to cover the UAT release dates of individual features in a phased manner so that there won't be any delay in the UAT completion. Before each UAT release the detailed knowledge transfer needs to be completed by the Bidder in onsite location. After successful completion of all UAT phases, the application will be moved into Production Environment with all features after necessary audits. The application needs to be complied with all audits finding by Bank's empanelled auditor, Internal Audit, VAPT, Data Migration Audit or any other audit as require by Bank or regulator.

6. Vendor shall ensure to provide fixes/resolution to the issues reported during VAPT audit on an ongoing basis at no additional cost.

7. Detailed plan should include the migration of existing customer data to the new CRM Solution.

8. Data Retention needs to be implemented as per the guidelines from RBI, regulatory bodies.

9. Performance testing needed to be completed and report need to be shared as part of the delivery. The product delivered should be having capability to run performance testing in UAT environment to ensure that each new release/customization is not having any impact on the performance of the application.

10. Bidder should ensure proper coding practices are followed and static and dynamic source code review needs to be conducted. Bidder need to share the source code review report of the application with bank along with UAT release. The Bank will conduct source code review by CERT-IN empanelled auditor and necessary fixes should be done by the bidder before go-live.

11. Bidder should complete the Development/Implementation of application by 4 months, if bidder is selected. Bidder shall adhere to the Warranty Period mentioned in the RFP document and post successful completion of the warranty Bank will enter to the AMC contract (if required by Bank), with Bidder initially for 3 years and can be extended for additional 2 more years.

12. The Hardware specification for the UAT, Development, Production, Pre-Production, and the DR environment needs to be provided by the bidder.

13. The application should have high availability in both DC and DR. DC to DR replication also to be configured by the bidder.

14. The vendor should ensure that the platform is scalable both vertically and horizontally without any customizations in the platform.



15. Bidder needs to support and coordinate comprehensively with the application vendor(s)/SI who is integrating (including API calls and SDK integrations) the application.
16. The bidder must provide support and applicable patches as and when released by the OEMs connected with the proposed solution during warranty and thereafter during AMC period. Any observation raised by Regulators/Bank/Other Agencies from time to time should be rectified and fixed by the bidder within 1 week time after reporting without any additional cost.
17. All software should be legally purchased, and necessary documents/certificates should be supplied along with the proposed solution.
18. The selected bidder should upgrade the application, due to the upgrade of the Platform Software OS, Middleware, DB goes out of support during the contract period without any additional cost to the Bank.
19. Security features should meet the standards and procedures as per Bank's IT Security Policy and procedures should be followed, in line with prevailing Industrial Standards including OWASP. The bidder should comply with Bank's vendor security baseline guideline. The bidder should ensure code related to the CRM solution has to be obfuscated properly with proprietary tools.
20. Ensure that the proposed solution follows regulatory requirements and other relevant regulatory guidelines. Any instances of non-compliances observed will need to be rectified well within timelines stipulated by the Bank. Incorporate changes in the system arising on impact of amendment to regulations/Bank's policy at no additional cost and well within timelines stipulated by the regulator.
21. The bidder should provide necessary admin portal and dashboard required for Bank's technology/operations team with user to role/function mapping and maker checker flow.
22. On awarding the contract, based on the understanding of current features and functionalities of the CRM application of the bank, bidder shall prepare a Business Requirement Document based on the requirements of the RFP.
23. The bidder shall undertake to obtain Bank's approval of the Business requirement documentation (over and above Functional Requirements Specifications and System Requirement Specifications) and associated project plans before work commences. The document should provide the plan in detail based on the milestones and criticality of the requirements. In case any feature/functionality which was part of RFP/Scope is dropped it should be specifically highlighted to Bank. Also, bidder needs to share RFP to BRD traceability to bank.
24. Bidder shall ensure that the proper solution is user friendly and easy to use by bank staff. Bidder shall ensure to provide GUI Prototype/Functional Prototype during BRD stage as required by Bank.

### **Testing and Acceptance**

The Bank will conduct "User Acceptance Test" (UAT) under guidance, review, and supervision of the vendor to ensure that all the functionality required by the Bank as mentioned in this SCOPE OF WORK /Requirements shared with the bidder is available and is functioning accurately as per the expectations of the Bank. Consequent to UAT, if some of the functionalities, specified in this SCOPE

OF WORK are not present in tune with the Bank's expectations, the vendor shall make appropriate changes for the functioning of Solution. The following services should be provided by the vendor:

- 1) Submit Test specifications, which outline the test cases, test objectives, test procedures, expected results, pass/fail criteria for each testing phases. Application Installation manual and inventory of all software deployed should be provided. Vendor will be responsible for setting and maintaining the test environment during the entire period of project implementation. The Vendor will ensure that the test environment's configuration and parameterization for conducting the UAT is in line with bank's requirement as mentioned in this SCOPE OF WORK/Requirements shared with the bidder. The vendor should ensure that test environment has the same configuration and functionalities, and it should be capable of synchronizing from production using restoration/other standard techniques functionalities as that of the live environment.
- 2) The test plan and test specifications shall be approved by the Bank before performing any tests.
- 3) The vendor will provide the scenarios for UAT and assist in preparing test cases including the test data to support all the Business scenarios. The Vendor should have dedicated resources to work with the Bank's project team for this purpose.
- 4) Any defects found during the tests shall be immediately rectified or resolved by the vendor at no cost to the Bank. Re-test shall be arranged by the vendor after the rectification and the re-test shall be documented. Regression testing must be done after rectification of the defects.
- 5) The vendor shall be required to perform a range of unit tests for individual sub-system to demonstrate that all items have been installed and configured properly.
- 6) There should be another System Integration Test after the completion of all unit tests for each individual sub-system to demonstrate successful integration and error handling that the delivered solution meets all agreed features and functional requirements specified in the tender/SCOPE OF WORK.
- 7) The vendor shall be required to demonstrate that the delivered solution can support the workload mentioned as banks expectation as part of the requirements mentioned by Bank.
- 8) The vendor shall be required to demonstrate the delivered solution can meet all the performance requirements specified e.g., the time needed in fail over.
- 9) The vendor will be responsible for conducting system integration testing to verify that all system elements have been properly integrated and that the system performs all its function. Vendor should support the integration of security tools like HIPS, DAM, Anti - APT, SIEM, PIM/PAM etc
- 10) The vendor will assist the Bank in analysing/ comparing the results of testing.
- 11) Vendor shall provide adequate resources for troubleshooting during the entire UAT process of the Bank. After the successful completion of all the testing from vendor team, the vendor shall be required to assist the Bank in performing the UAT to accept the delivered solution.
- 12) The vendor will be responsible for maintaining appropriate program change control and version control of the system as well as documentation of UAT and change of configuration and

parameterization after, making changes in the system and should be checked in to Bank's Configuration Management Tool e.g., SVN. Baseline parameter configurations should be documented and provided for OS, Middleware, DB and Application layers.

13) Vendor shall be responsible for creating the required interfaces with the Core Banking and other systems in the bank as per the requirements of the solution. The interfaces shall be with web services, database connectivity, URLs, XML etc for both online/real-time and batch mode integrations. Suitable error logs and reconciliation systems need to be put in place wherever integrations are being built so that errors or omissions can be avoided. Suitable checks for the same may also be incorporated.

14) All errors, bugs, enhancements / modifications required during and after testing will be resolved within the overall timelines for implementation.

15) The vendor will be responsible for using appropriate tools for logging, managing, resolving, and tracking issues and its progress, arising out of testing, and ensuring that all issues are addressed in a timely manner to the satisfaction of the Bank and as per the requirements mentioned. Issue Tracker shall also be made available to Bank's team.

#### **Training and Documentation:**

1) The vendor needs to provide free trainings and educational materials for all items supplied, to the Bank's technical staff, on system/application administration, configuration, and entire operations of the proposed solution.

2) Training must be provided in all functional areas and should be of sufficient duration – to the User's satisfaction.

3) Vendor will be responsible to develop training and reference materials for all the functionality of the software. Training materials should comprehensively cover all graphs, processes flows, screenshots of the actual system functionality etc.

4) All trainings must be conducted at the Bank's Office, unless with prior approval given by the Bank. All training sessions must be conducted before production launch.

5) . Product Certification training shall be provided by OEM mandatorily.

6) Training should be of vendor/OEM certification level standard on the delivered solution with certification training materials.

7) The training should at least cover the following areas:

- Functionality available in the solution including logic and methodology of the same
- Customization using SDK Toolkit or any other IDE
- Customization / Parameterization.
- Techniques for slicing and dicing of data, information, and output.
- Advanced trouble shooting techniques if any.
- Deployment of application and identification procedures, application controls, analysis procedures provided as part of the solution.

- Monitoring & management of Webservers, Middleware's, Database as part of the solution
- Techniques of customization, development and configuration required for the solution provided.
- System and application administration such as creation/modification and deletion of user, user groups, user privilege settings, user license management, team creation, workflow creation, data import management, email configuration management, Product Configurations, analysis of application & database logs, document repository management, GUI Creation/Modification, Relationship creation for objects in CRM, System Information Security Settings etc.

8) Document deliverables include but not limited to:

- Project plan, technical design document and product specifications
- Test plan, test specifications and test reports
- Training guide
- Standard product manual including software media and license materials.
- Standard operating procedure documents should be provided.
- Detailed installation documents should be included in the documents
- Issue tracker during overall project implementation.

9) Detail technical design document to be created for the development phase and proper test documentation along with approved test results to be shared with the Bank along with the UAT build.

10) Source code Audit certificate, OEM declaration that application is devoid of any malicious code, covert channels and free from any known bugs at the time of delivery and all subsequent releases of the proposed solution.

11) All works related to the assignment handled are to be well documented and will form the part of deliverables. They should be delivered both in hard copy and soft copy at the end of each stage.

### **Warranty & Service:**

The warranty, on-site/offsite maintenance and services/support will be provided to cover software on a 24x7 throughout the said period. Details of the warranty period of the software as per the warranty policies of the respective principals or OEM should be specified clearly along with Mode/method of support. The details of the AMC provided along with the mode of support should be clearly specified. Vendor has to offer the Bank support for the application software by Annual Maintenance Contract (AMC) after the expiry of the warranty period if Bank is opting for the same. The scope, deliverables, time schedules and the support provided during the AMC period must be specified clearly. Support provided to the bank during the implementation, warranty, AMC periods must be clearly specified along with the problem escalation chart, method of support, etc.

The vendor shall sign a comprehensive Service Level Agreement with the Bank covering all relevant areas along with Purchase order. Warranty period shall be effective from the Go-Live date of the solution. Any augmented part of the solution is also covered under warranty from respective date of installations till the expiry of the Service Level Agreement. The support should cover supplied software installation, Database software, patches, bug fixes, upgrades, updates, firmware upgrades

and complete maintenance of all software components throughout the warranty/support/AMC period. Support level escalation chart must be provided for DC and DR sites.

Annual Maintenance contract / warranty / support terms must be in accordance with the SLA (Service Level Agreement) and NDA (Non-disclosure Agreement) only, notwithstanding anything contrary contained in any other documents whether executed before or after the execution of the agreements. On the happening of an incident/defect the maximum turnaround time should be defined in the SLA. The solution provided should be optimally configured such that it works at peak performance level. Any degradation in performance should be rectified by the vendor. The vendor shall absorb any hidden cost arising out of situations, with respect to services and maintenance of the complete software and related solutions offered / supplied by Vendor, which arises due to an act or omission of vendor. Vendor should take precaution to eliminate the defects to the maximum to reduce the downtime to the minimal time. A minimum uptime of 99.5% per annum is compulsory. Vendor should assist the bank in completing licensing agreements, if any with OEMs prior to commencement of warranty period. Vendor should inform compulsorily in the submitted Bid whether any licensing agreement must be completed prior to or after delivery of any ordered item. Draft copy of such required agreement must be submitted with the Bid. Vendor must take full and complete responsibility for support of all supplied items.

Undertake immediate bug fix actions in the event of software failure causing an interruption of operation of the CRM application as per the response / resolution times defined in SLA. Vendor should notify about all the detected software errors and correct them in the shortest possible time. The SI/Vendor will be responsible for notification of new versions/ releases of the software and supervise their implementation in mutually agreed deadlines. Vendor should enter the obligation that in the event OEM releases a new version of software, and Bank is using one of the previous versions, OEM would provide the full scope of services to the version used by the Bank for the period of at least 5 years from the go-live date.

The vendor should confirm that the software is not compromising the security and integrity of Bank's data and not compromising the quality of operation of Bank, particularly the services rendered to customers. The vendor should support the Bank in integrating any new applications with the CRM Application. Bidder shall be agreeable for on-call/on-site support in case of any emergency or planned activities.

During the period of AMC, if the service provided by the bidder is not satisfactory, Bank reserves the right to terminate the AMC contract.

The support shall be given in person or through telephone and E-mail within a reasonable time. Only licensed copies of software shall be supplied and ported. Further, all software supplied shall be of latest tested proven version which is bug free and malware free. The Solution offered should have all components which are bug free, no malicious code, no covert channels, no known vulnerabilities reported and of latest stable version, which are having a 3-year clean track record.

The Bidder shall be bound to provide technical consultancy and guidance for successful operation of the Solutions and its expansion in future by the Bank during the warranty and AMC period. Preventive maintenance shall be compulsory during Warranty and AMC period.

Preventive maintenance activity should be completed every quarter and report should be submitted to the Bank. Preventive maintenance activity should take care of parameter configuration verification, application health check-up, fine-tuning the configuration, verification of bugs/patches etc.

### **Delivery and Installation**

The application as per the purchase order specifications should be delivered in full at our Production, Pre-prod, UAT& DR, within a maximum of 6 months from the date of issuing the Purchase order. The timelines are to strictly adhere, and any delay shall attract penalty. If the supply is delayed inordinately, the Bank can cancel the said purchase deal without any obligation on its part and the same shall be binding on the vendor. Vendor should install all supplied software, including OS, database, and third-party supporting software, drivers, patches, and all other required software for the smooth functioning of the application / system at Data Center.

Vendor should also designate a Project Manager / Leader to ensure installation and operationalization of all supplied software items. This Project Manager / Leader should be the single point contact of the Bank for its clarifications, support etc.

The Name, designation, contact details of the identified Project Manager / Leader should be informed to the bank along with the SCOPE OF WORK. Vendor should submit the detailed documentation for the entire installation in both soft copy and hard copy.

Bank reserves the right to involve third parties, application vendor etc., in the installation Process, if it deems so and the vendor shall render all assistance for the same. Vendor should provide necessary knowledge transfer to Bank for further development and maintenance of the solution.

### **Penalty Clauses**

SLA and penalty clauses will be decided mutually after release of purchase order.

### **ELIGIBILITY CRITERIA**

Bidders meeting the criteria as per **Annexure- XIV** are eligible to submit the Bids along with the supporting documents. If the Bid is not accompanied by all the required documents mentioned in **Annexure- XIV**, the same would be rejected.

Preference shall be given to solutions widely used in India and for SI & Bidder who had completed the solution implementation in 3 Public/Private Sector Banks in India. Bank should be allowed to interact, and reference check these implementations.

### **AMENDMENT OF RFP:**

- At any time prior to the deadline for submission of bids, the Bank, for any reason, whether at its own initiative or in response to a clarification requested by a prospective bidder, may modify the RFP by amendment.

- In order to afford prospective Bidders reasonable time in which to take the amendment into account in preparing their bid, the Bank, at its discretion, may extend the deadline for the submission of bid.
- All bidders who have procured this RFP document from the Bank shall be notified of the amendment in writing by e-mail or fax or post, and all such amendment(s) shall be binding on them.

#### **Period of Validity of Bids**

- **Validity Period:** -Bids shall remain valid for 120 days from the last date specified for submission of bids in this RFP. The Bank Limited holds the rights to reject a bid valid for a period shorter than 120 days.
- **Extension of Period of Validity:** - In exceptional circumstances, The Bank may solicit the Bidder's consent to an extension of the validity period. The request and the response thereto shall be made in writing. Extension of validity period by the Bidder should be unconditional and irrevocable.

#### **Cancellation of Bid**

- The Bank reserves all right to cancel/re-issue/re-commence the entire bid process and or any part in case of any anomaly, irregularity, or discrepancy in regard thereof without assigning any reason whatsoever, at the sole discretion of the Bank. Any decision in this regard shall be final, conclusive, and binding on the bidder.

#### **Software/Hardware**

1. The Bank reserves the right to audit the Application / Device /firmware/sdk by suitable Security Auditor/Auditors appointed by the Bank.
2. The Bidder shall provide complete legal documentation of all subsystems, licensed operating systems, licensed system software, and licensed utility software and other licensed software. The Bidder shall also provide licensed software for all software products whether developed by it or acquired from others as part of the project. The Bidder shall also indemnify the Bank against any levies / penalties on account of any default in this regard.
3. In case the Bidder is coming with software which is not its proprietary software, then the bidder must submit evidence in the form of agreement with the software vendor which includes support from the software vendor for the proposed software for the full period required by the Bank.
4. The bidder needs to produce certificates of quality control and certification done on the Application/ Device/Drivers/SDK's in the recent past.

#### **B. Acceptance of Application**

The Bank will accept the Application only after the successful conduct of acceptance testing by the Bank's Team. Application will be considered to be accepted only after the Bank issues an acceptance letter to the vendor. The said Application may be audited for risk analysis of application functionality and security features by Bank's IS Audit team or a third-party vendor appointed by the Bank, if so desired by the Bank.



### **C. Inspection and Tests**

1. Bank or its representative shall have the right to inspect and/or to test the Application to confirm their conformity to the requirements/specifications mentioned in this RFP.
2. The inspections and test may be conducted on the premises of the vendor, at point of delivery and/or at the final destination. If conducted on the premises of the vendor all reasonable facilities and assistance, including access to documents, code and the data, shall be furnished to the inspectors at no charge to the Bank.
3. The inspection may be conducted on the bidder proposed solution by the Bank or Bank appointed auditors at the vendor site.

### **D. Information Ownership**

1. All information processed, stored, or transmitted by successful Bidder's Device/Software belongs to the Bank. By having the responsibility to maintain the software, the Bidder does not acquire implicit access rights to the information or rights to redistribute the information. The Bidder understands that civil, criminal, or administrative penalties may apply for failure to protect information appropriately.
2. Any information considered sensitive by the Bank must be protected by the successful Bidder from unauthorized disclosure, modification or access. The Bank's decision will be final. On completion of project or termination of agreement all information of Bank or Banks customer or any other sensitive information should be returned to Bank and deleted from Vendor premise.
3. Types of sensitive information that will be found on Bank system's which the Bidder plans to support or have access to include, but are not limited to: Information subject to special statutory protection, legal actions, disciplinary actions, complaints, IT security, pending cases, civil and criminal investigations, etc. The successful bidder shall exercise adequate judgment to decide if particular information is sensitive and consult with the Bank in case of doubts.

### **E. Adherence to Standards**

The bidder should adhere to laws of land and rules, regulations and guidelines prescribed by various regulatory, statutory and Government authorities in India. The Bank & Regulators reserves the right to conduct an audit/ongoing audit of the services provided by the bidder. The Bank reserves the right to ascertain information from the Bank's and other institutions to which the bidders have rendered their services for execution of similar projects.

### **F. Security Configuration, Monitoring and Audit**

1. The bidder should support proactively the implementation of baseline security configurations for Application/Devices/supporting firmware/drivers/SDK in accordance with the industry best practices and Bank's Board approved baseline documents.



2. Compliance with security best practices may be monitored by periodic security audits performed by or on behalf of the Bank. Bank/Regulator/Bank's empanelled Auditors has the right to conduct the security Audit. The periodicity of these audits will be decided at the discretion of the Bank. Periodicity for Regulatory Audits would be required as per the rules and guidelines laid down by the regulator or as required by the regulator not limited to UIDAI /NPCI/RBI/other authorities/agencies/other relevant Acts, rules, regulations, directions as applicable. These audits plan to include, but are not limited to, a review of access and authorization procedures, physical security controls, input/output controls, DB controls, backup and recovery procedures, network security controls and program change controls.

3. The bidder shall take utmost care to ensure that the security controls are in place to avoid malpractices and fraud attempts.

4. Bank/Regulator/Bank's empanelled Auditors reserves the right to audit the successful bidder's /OEM's premise/Data Centers and platform used for CRM Banking Solution development and its associated hardware/software.

#### **G. Considerations for Proposed Hardware [For on prim solutions]**

1. The Bidder should provide the detailed specifications for hardware required.

2. Bidder should specify the configurations including the core, memory and the storage required along with any other specific configurations for VM/Physical Server.

3. The bidder shall specify the suitable hardware and supporting software which shall deliver the best throughput and performance considering the present volumes and the sizing proposed. Bidder also need to share the algorithms used for capacity sizing with the Bank.

#### **H. Reporting Progress**

The Bidder shall report progress of all the activities covered within the scope of work given in this RFP.

#### **I. Compliance with IS Security Policy**

The Vendor shall have to comply with Bank's IT & IS Security policy in key concern areas relevant to the RFP, details of which will be shared with the finally selected Bidder. A few aspects are as under:

1. The vendor shall acknowledge that The India EXIM Bank business data and other proprietary information or materials, whether developed by The India EXIM Bank Limited or being used by The India EXIM Bank pursuant to a license agreement with a third party are confidential and proprietary to The India EXIM Bank and the vendor shall agree to use reasonable care to safeguard the proprietary information and to prevent the unauthorized use or disclosure thereof. Any modification in the data provided by the Bank should be done only on proper authorization of the Bank. Proper and advanced security measures should be ensured by the vendor in case of data exchange between Bank and the Vendor. The caution exercised by the vendor shall not be less than that used by it to protect its own proprietary information. The vendor recognizes that the goodwill of India EXIM Bank Ltd depends, among other things, upon Vendor keeping such proprietary information confidential

and that unauthorized disclosure of the same by Vendor could damage The India EXIM Bank. Vendor shall use such information only for the purpose of rendering the Service(s) to The India EXIM Bank.

2. IS Security principles such as environmental, physical and logical security aspects should be followed by the Vendor. Also Hardware, operating systems and related software should be periodically upgraded for ensuring data protection and privacy.

3. The Vendor shall, upon termination of the Contract/Agreement for any reason, or upon demand by The India EXIM Bank, whichever is earliest, return/ destroy permanently to the satisfaction of the Bank, any and all information provided to Vendor by The India EXIM Bank, including any copies or reproductions, both hardcopy and electronic.

4. Data Encryption/Protection requirements of the Bank.

5. Incident response and reporting procedures.

6. In general, confidentiality, integrity and availability must be ensured.

## **TERMINATION**

### **A. Termination for Default**

1. The Bank, without prejudice to any other remedy for breach of contract, by written notice of default sent to the successful bidder, may terminate this contract in whole or in part:

- If the successful bidder fails to deliver any or all of the deliverables within the period(s) specified in the Contract, or within any extension thereof granted by the Bank; or;
- If the Successful Bidder fails to perform any other obligation(s) under the contract.
- If the Successful Bidder, in the judgment of the Bank has engaged in corrupt or fraudulent

practices in competing for or in executing the Contract. Corrupt practice means the offering, giving, receiving or soliciting of anything of value or influence the action of a public official in the procurement process or in contract execution; and “fraudulent practice” means a misrepresentation of facts in order to influence a procurement process or the execution of a contract to the detriment of the Bank, and includes collusive practice among Bidders (prior to or after bid submission) designed to establish bid prices at artificial non-competitive levels and to deprive the Bank of the benefits of free and open competition.

2. In the event, the Bank terminates the Contract in whole or in part, the Bank may procure, upon such terms and in such manner as it deems appropriate, similar Goods or Services to those undelivered, and the Successful Bidder shall be liable to the Bank for any excess costs for such similar Goods or Services. However, the Successful Bidder shall continue performance of the Contract to the extent not terminated.

### **B. Termination for Insolvency**

If the Bidder becomes Bankrupt or insolvent, has a receiving order issued against it, compounds with its creditors, or, if the Bidder is a corporation, a resolution is passed or order is made for its winding up (other than a voluntary liquidation for the purposes of amalgamation or reconstruction), a

receiver is appointed over any part of its undertaking or assets, or if the Bidder takes or suffers any other analogous action in consequence of debt; then the Bank may, at any time, terminate the contract by giving written notice to the Bidder. If the contract is terminated by the Bank in terms of this Clause, termination will be without compensation to the Bidder, provided that such termination will not prejudice or affect any right of action or remedy which has accrued or will accrue thereafter to the Bank. In case, the termination occurs before implementation in all the locations in terms of this clause, the Bank is entitled to make its claim to the extent of the amount already paid by the Bank to the Bidder.

### **C. Termination for convenience**

The Bank, by written notice sent to the Bidder, may terminate the Contract, in whole or in part, at any time at its convenience. The notice of termination shall specify that termination is for the Bank's convenience, the extent to which performance of work under the Contract is terminated and the date upon which such termination becomes effective.

### **D. Termination – Key Terms & Conditions**

1. The Bank shall be entitled to terminate the agreement with the Bidder at any time by giving sixty (60) days prior written notice to the Bidder. The Bank shall be entitled to terminate the agreement at any time by giving notice if the bidder:

- has a winding up order made against it; or
- has a receiver appointed over all or substantial assets; or
- is or becomes unable to pay its debts as they become due; or
- enters into any arrangement or composition with or for the benefit of its creditors; or
- Passes a resolution for its voluntary winding up or dissolution or any Regulatory or statutory body has raised sanctions on the Company, Directors or Promoters or if it is dissolved.

2. The Bidder shall have right to terminate only in the event of winding up of the Bank.

### **E. Consequences of Termination**

1. In the event of termination of the Contract due to any cause whatsoever, [whether consequent to the stipulated term of the Contract or otherwise], The Bank shall be entitled to impose any such obligations and conditions and issue any clarifications as may be necessary to ensure an efficient transition and effective business continuity of the Service(s) which the Bidder shall be obliged to comply with and take all available steps to minimize loss resulting from that termination/breach, and further allow the next successor Bidder to take over the obligations of the erstwhile Bidder in relation to the execution/continued execution of the scope of the Contract.

2. In the event that the termination of the Contract is due to the expiry of the term of the Contract, a decision not to grant any (further) extension by the Bank, the Bidder herein shall be obliged to provide all such assistance to the next successor Bidder or any other person as may be required and as the Bank may specify including training, where the successor(s) is a representative/personnel of the Bank to enable the successor to adequately provide the Service(s) hereunder, even where such assistance is required to be rendered for a reasonable period that may extend beyond the term/earlier termination hereof.

3. The termination hereof shall not affect any accrued right or liability of either Party nor affect the operation of the provisions of the Contract that are expressly or by implication intended to come into or continue in force on or after such termination.

## **F. Exit Option**

1. The Bank reserves the right to cancel the contract in the event of happening one or more of the following Conditions:

- Failure of the bidder to agree on the terms of the contract within 10 days from the date of communication of award by the Bank and sharing of terms of contract by the Bank. If the bidder does not meet these criteria, then the Bank may at its discretion declare the next best bidder as the successful bidder.
- Failure of the successful Bidder to sign the contract within 30 days from the agreement on the terms of the issue of Contract by the Bank or as per the Bank's specified date.
- Delay in completing installation / implementation and acceptance tests/ checks beyond the specified periods.
- Serious discrepancy in functionality to be provided or the performance levels agreed upon, which have an impact on the functioning of the Bank.

2. The Bank and the Bidder shall together prepare the Reverse Transition Plan as part of Bidder exit plan. However, the Bank shall have the sole discretion to ascertain whether such Plan has been complied with.

3. Notwithstanding the existence of a dispute, and/or the commencement of arbitration Proceedings, the Bidder will be expected to continue the facilities management services. The Bank shall have the sole and absolute discretion to decide whether proper reverse transition mechanism over a period of 6 to 12 months, has been complied with.

4. Reverse Transition mechanism would typically include service and tasks that are required to be performed / rendered by the Bidder to the Bank or its designee to ensure smooth handover, transitioning of application knowledge, Bank's deliverables, and maintenance and facility management.

## **G. Termination of contract**

1. Apart from the general grounds of default mentioned above, the Bank reserves its right to cancel the order in the event of, but not limited to, one or more of the following specific situations:

- Unnecessary or unwarranted delay in execution of the work allotted or delay in delivery of devices to the respective locations.
- Delay in services of the complaints raised.
- Delay in providing the requisite manpower at the Bank's site.
- Delay in submission of reports beyond the stipulated periods.
- Breach of trust is noticed during any stage of the consultancy assignment.
- The selected bidder commits a breach of any of the terms and conditions of the bid.
- The selected bidder goes into liquidation voluntarily or otherwise.
- If it is found at any stage that the bidder has concealed any important information or has submitted any false information or declaration particularly regarding any pending legal action or blacklisting status.
- The Bank reserves the right to recover any dues payable by the selected bidder from any amount outstanding to the credit of the selected bidder, including the pending bills and security deposit, if any, under this contract or any other contract/order.
- The decision of the Bank as to whether or not any one or more of the above situations has (have) arisen shall be final and binding on the vendor.

2. In addition to the cancellation of order, The Bank reserves the right to appropriate the damages from foreclosure of the Bank guarantee given by the bidder.

#### **H. Termination of partner of Bidder**

1. In case service of the partner of successful bidder are terminated due to any reasons whatsoever including but not limited to the reasons mentioned above, the bidder shall be responsible for identifying an alternative partner to execute the tasks unfinished by the terminated partner.

2. The party identified by the successful bidder shall also comply with the eligibility criteria listed out in this RFP.

#### **Responsibilities of bidder:**

Successful bidder selected based on the evaluation criteria specified in this RFP should.

1) Enter into the Service Level Agreement (SLA) & Non-Disclosure Agreement (NDA) with the Bank in the format provided by the bank.

2) Set up, installation and testing of the required Hardware/Software, Integrations (including API calls and SDK integrations) with associated servers/services for providing all the features of the CRM solution, migration of existing customers data, cases and lead data, deployment of the solution in Development, UAT, Pre-Production, DC and DR environments.

3) Bidder shall deliver SDK Toolkit, API Interface, DB Plugins etc to Bank's technical team for customization of the Product at no additional cost.

4) Migration of customer data, existing leads and service request/case data, Migration strategy, Migration Plan, Pre and Post migration reconciliation and Audit support in the new solution.

5) Ensure that Solution supplied should be capable to get integrated with all existing integrations (including API calls and DB integrations). All integrations to be STP without manual interventions. All the features currently available in the current solution needs to be available in the solution proposed by the bidder.

6) The vendor should invariably furnish any deviations from the specifications and/or the terms and conditions of the SCOPE OF WORK, specifying the reasons and justifying such deviations. Non-mention of deviations shall imply compliance to Bank's specifications. Any non-disclosure of such information may disqualify the vendor at later stages of the Technical / commercial evaluation of the Bids submitted by the vendors.

7) Identify Project Manager, Project Leaders and members of the development teams with relevant skills. There has to be daily sync up calls with Bank's team and weekly status report to be sent to Bank to evaluate the progress of the project. Project Governance to be mutually decided and availability of Senior Management for Project Steering committee meetings. The vendor shall intimate the Bank if there is any change in the project team. The vendor will ensure proper back up of project leaders, developers and manager. The replacement plan should be intimated with the Bank.

The minimum experience of the project team personnel like Project Manager, Project Leader and Programmers put on work preferably should be 10, 7, 5 years respectively. Systems study and all

development activities if any will have to be undertaken at the Bank's locations acceptable to the Bank. After the development completion of each feature, an onsite knowledge transfer needs to be conducted by the bidder's team. For setting up the production/other environments the bidder resources should be available in the client location. Bidder has to have dedicated onsite resources as technical lead and the individual resources for each layer (eg: UI, Middleware, DB, Business Layer, and Functional Analysis) available to support bank from implementation time and till initial warranty period of 1 year. Also, project team members shall be able to work from home options in case of any contingency/pandemic situations.

8) Ensure that the solution offered should have clear licenses. In case freeware's are to be used the same has to be procured and provided to the Bank. Also, the vendor has to ensure that the freeware can be used by the Bank for running the required solution.

9) Successful bidder shall strictly comply with the key dates and time stipulated in the document. However, all efforts shall be made to explore the possibilities of quicker ways of delivering the products, complete the initial build, and achieve substantial completion and final acceptance.

10) The capabilities, operating characteristics and other technical details of the software offered should be furnished together with detailed product manuals, brochures, literature etc. The make, model and part number of each component shall be compulsorily indicated.

11) Successful bidder shall alert Bank and its own personnel about the risks either anticipated or faced either prior and / or during and / or after the execution of the project and provide all the possible solutions either to totally eliminate or to minimize such risks.

12) Successful bidder shall ensure all possible efforts in continuous improvement in processes, tools and procedure and practice the world class methodologies in delivering / installing products and services, managing project and also while interacting with third party vendors for cross-integration.

13) The bank would have the option to enter into source code Escrow arrangement, without incurring any additional charges to the vendor.

14) The bank is very much interested in long-term association with the potential vendors and hence vendors shall adapt to changes in Bank's requirements and provide superior products and services and not be mere fulfilment of contractual commitments set here forth.

15) Provide training material on proposed solution to designated personnel of the Bank for handling the system.

16) Ensure that the proposed solution is in compliance with regulatory and statutory requirements and other relevant regulatory guidelines. Any instances of non-compliances observed will need to be rectified well within timelines stipulated by the Bank. Incorporate changes in the system arising on impact of amendment to regulations/Bank's policy at no additional cost and well within timelines stipulated by the regulator.

17) Provide modular wise user manual as well as Administrator Manual including logic used, Analysis done, methodology, etc. pertaining to Solution proposed by the Bidder as per the RFP. There should be onsite support during implementation and initial 1 year warranty period. A team size of 4 including a technical lead. Individual resources should be available for individual layers (e.g., Application,

Middleware, DB). Based on the criticality of the issues, successful bidder should provide onsite/offshore support during the warranty and AMC period. Additional developer cost/Support cost shall be agreed upfront for a period of 5 years.

18) In case the product/ solution/ vendor/ OEM/SI are amalgamated/ dissolved, the impact of such an event should not have any adverse implication on the service level/ timeline/cost that is proposed for implementation of the solution. Such event would not dilute the responsibility of the successful bidder for completing the implementation within mutually agreed timelines.

19) The successful bidder shall provide technical support for the software application/ supplied under this contract, and will have overall responsibility of the performance, functionality and operation of the systems under this contract. Any supporting software provided/installed/configured by the bidder for smooth functioning shall be maintained/fine-tuned/parameterized by the bidder from time to time, so that the solution delivers optimal performance.

20) Any information security gaps in the solution shall be redressed by vendor on free of cost.

21) The bidder to provide the Bank with the proper backup and recovery procedure, with necessary documents so as to meet any exigencies. The Regulatory guidelines on the preservation of data should be followed correctly. Proper Data Archival & Purging needs to be implemented for proper performance.

22) Treat all data and information about the Bank obtained during in the execution period and thereafter, in strict confidence and shall not reveal such information to any other party without the prior written approval of the Bank.

23) The bidder shall also ensure that the proposed solution is scalable and shall be implemented in DR environment in Active -Passive Mode with DC Environment. Application and Database in DC environment shall be replicated to DR Environment through standard data transfer/replication and synchronization mechanism without any Data Loss in case of any hardware failures.

#### **Payment Terms:**

30% after UAT Acceptance

40% after Movement to Production

10% after successful DR DRILL conduction in Live Environment

20% after satisfactory working of solution for six months after successful implementation.

Resource Cost - at end of each quarter post deployment of resource

Customization Charges - After deployment in production and sign off from Bank's Team

#### **Taxes and Duties:**

The Successful Bidder will be entirely responsible to pay all taxes whatsoever in connection with delivery of the services at the sites including incidental services and commissioning. Wherever the laws and regulations require deduction of such taxes at the source of payment, Bank shall affect such deductions from the payment due to the Bidder. The remittance of amount so deducted and issue of certificate for such deductions shall be made by Bank as per the laws and regulations in force.

Nothing in the contract shall relieve the Bidder from his responsibility to pay any tax that may be levied in India/abroad on income and profits made by the Bidder in respect of this contract.



### Technical Score Mark Distributions [Scoring Model]

Maximum Points 100

Criteria	Criteria Points	(Max Marks)
A1. Successfully completed/ on-going application development and rollout projects of similar nature (CRM) in BFSI Sector between FY2018-19 to FY2020-21 (Purchase order date will be considered while calculating marks e.g., purchase order issued before April 2018 will not be considered)	20	Max Marks 20
<ul style="list-style-type: none"> <li>project value &gt; 5 Cr</li> <li>project value &gt; 3Cr</li> <li>project value &gt; 2 Cr</li> <li>project value &lt;2 Cr</li> </ul>	20 10 5 0	
A2. Satisfactory Services Certificate as per prescribed in Annexure – XIII format only		Max marks 20
<ul style="list-style-type: none"> <li>Satisfactory Services Certificate by &gt;= 3 Clients</li> <li>Satisfactory Services Certificate by &gt; 1 and &lt;3 Clients</li> <li>No Satisfactory Services Certificate</li> </ul>	20 10 00	
A3. Proposed solution, Project Implementation methodology presentation and reference check/feedback		Max Marks 25
A4. Bidder Support Center in Mumbai and Bengaluru		Max Marks 10
<ul style="list-style-type: none"> <li>Support Center or Office in Mumbai and Bengaluru</li> <li>Support Center or Office in Mumbai or Bengaluru Only</li> <li>No Support Center or Office in Mumbai or Bengaluru</li> </ul>	20 10 0	
A5. Proposed Solution Compliance to Technical Specification mentioned in Annexure-XXI		Max Marks 25
<ul style="list-style-type: none"> <li>&gt;=80% solution compliance and min 10% customization</li> <li>&gt;=75 and &lt;80 solution compliance and min 10% customization</li> <li>&gt;=70 and &lt;75 solution compliance and min 10% customization</li> <li>Solutions not meeting above criteria</li> </ul>	25 15 10 0	

**To qualify for price bid opening, bidder must meet all eligibility criteria and minimum 70% technical score is must.**

## Evaluation of Bids

The objective of evaluation methodology is to facilitate the selection of the technically superior solution/vendor at optimal cost.

The Bank reserves the right to modify the evaluation process at any time during the Tender process (before submission of technical and commercial responses by the prospective bidder), without assigning any reason, whatsoever, and without any requirement of intimating the Bidders of any such change.

Any time during the process of evaluation the Bank may seek specific clarifications from any or all the Bidder [Service Provider].

It may please be noted that EXIM BANK reserves the right to reject any proposal in case same is found incomplete or not submitted in the specified format given in this RFP document.

The evaluation process of the bids proposed to be adopted by the Bank is indicated below. The purpose of it is only to provide the Bidder an idea of the evaluation process that the Bank may adopt.

The details of 'Eligibility Criteria of the Bidder', provided by the vendor in its response to this RFP, will be evaluated first, based on the criteria described in Annexure XIV.

The technical and commercial responses to this RFP will be considered further only for those vendors who meet the Eligibility Criteria.

## Technical Evaluation

- i. Eligibility Criteria bids received from the Bidder will be opened in the presence of representatives of the bidders who choose to be present as per the schedule notified by the Bank. A detailed analysis will be subsequently carried out by the Bank. Based on responses to 'Eligibility Criteria', Bidder will be short listed for technical evaluation further.
- ii. The technical bid will be analysed and evaluated, based on which the Technical Score (TS) shall be assigned to each bid. Technical Bids receiving a TS greater than or equal to a score of 75 (cut-off marks) will be eligible for consideration in the subsequent round.

## **Financial Evaluation**

The Financial Bid of those Bidders who have been found to be technically eligible will be opened. The Financial bids of ineligible bidders will not be opened.

The Financial Bids shall be opened in the presence of representatives of technically eligible Bidders, who may like to be present. The Bank shall inform the date, place and time for opening of the Financial Bid.

## **Evaluation and Comparison of Bids**

75 % weightage will be awarded for Technical Evaluation and 25 % weightage will be awarded for Financial Evaluation.

Technical Bid will be assigned a technical score (Ts) out of a maximum of 100 points, as per the **Scoring Model** provided in the previous section.

The commercial scores would be normalized on a scale of 100, with lowest score being normalized to 100 and the rest being awarded on a pro-rata basis. Such normalized scores would be considered for the purpose of QCBS based evaluation, explained in section below.

## **Final Evaluation Criteria - Quality and Cost based selection (QCBS)**

The individual Bidder's commercial scores (CS) are normalized as per the formula below:

$$F_n = F_{\min} / F_b * 100 \text{ (rounded off to 2 decimal places)}$$

Where,

$F_n$  = Normalized commercial score for the Bidder under consideration

$F_b$  = Absolute financial quote for the Bidder under consideration

$F_{\min}$  = Minimum absolute financial quote

$$\text{Composite Score (S)} = T_s * 0.75 + F_n * 0.25$$

The Bidder with the highest Composite Score(S) would be awarded the contract.

**INSTRUCTIONS TO BIDDERS**

<b>1.0</b>	<b>Location</b>
	Export-Import Bank of India, 21st Floor, Centre One Building, World Trade Center, Cuffe Parade, Mumbai 400 005 and Regional Offices in pan India
<b>2.0</b>	Tenderers must get acquainted with the proposed work, specifications, conditions of contract and other conditions carefully before tendering. The Tenderer shall email <b>clarifications up to April 13, 2022, 17.00 Hrs in pre bid query format only</b> . No request of any change in conditions shall be entertained after pre bid date of the tender.
<b>3.0</b>	Any printing or typographical errors /omission in tender document shall be referred to EXIM Bank and their interpretation regarding correction shall be final and binding on Service Provider.
<b>4.0</b>	All costs and expenses incurred by respondents in any way associated with the development, preparation, and submission of responses, including but not limited to; the attendance at meetings, discussions, demonstrations, etc. and providing any additional information required by the Bank, will be borne entirely and exclusively by the Respondent.
<b>5.0</b>	Respondents should provide details of their contact person, telephone, fax, email and full address(s) to ensure that replies to RFP could be conveyed promptly.
<b>6.0</b>	<b>Transfer of Tender Documents</b>
	Transfer of tender documents purchased/ downloaded by one intending Bidder to another is not permitted
<b>7.0</b>	<b>Contract</b>
	<p>a) The bidder shall not assign or sub-let his contract or any substantial part thereof to any other bidder.</p> <p>b) The Supplier/ Selected Bidder shall not use any documents, data, and other information received from the Purchaser for any purpose other than the design, procurement, or other work and services required for the performance of the Contract</p>
<b>8.0</b>	<b>Amendment to the bidding document</b>
	<ul style="list-style-type: none"> <li>At any time prior to the deadline for submission of Bids, the Bank, for any reason, may modify the Bidding Document, by amendment.</li> <li>All Bidders must ensure that all amendments/enhancements (if any) in the RFP have been considered by them before submitting the bid. Bank</li> </ul>

	<p>will not have any responsibility in case some omission is done by any bidder.</p> <ul style="list-style-type: none"> <li>• The bank at its discretion may extend the deadline for the submission of Bids.</li> <li>• The Bank shall not be liable for any communication gap. Further the Bank reserve the right to scrap the RFP or drop the tendering process at any stage without assigning any reason.</li> </ul>
<b>9.0</b>	<b>Bid Currency</b>
	Bids in response to this RFP to be quoted in Indian Rupee (INR) only.
<b>10.0</b>	<b>Obligations of Successful Bidder</b>
	<p><b>a.</b> The successful bidder has to supply all the components, services and licenses to make solution complete.</p>
	<p><b>b.</b> The successful bidder shall deploy their own trained and experienced engineers for implementing, managing and maintaining the system.</p>
	<p><b>c.</b> Whenever any new threats / vulnerabilities become public, the bidder/successful bidder shall bring this to the notice of the Bank immediately and help/guide the Bank in plugging the same. Once the call has been attended, successful bidder engineers shall put their maximum efforts and deploy their best resources to resolve all calls at the earliest possible time frame at all locations and ensure appropriate uptime.</p> <p><b>d.</b> The bidder/successful bidder to ensure that during implementation of complete, the critical services hosted at EXIM BANK shall not face any downtime due to security breach, security incident, improper configuration of security units/ appliances/ components</p>
<b>11.0</b>	<b>Signing of the contract</b>
	<p><b>a.</b> The successful Bidder may be required to execute a non-disclosure agreement (NDA) and Service Level Agreement (SLA) with Exim Bank within 30 days from the date of receipt of the notice of acceptance of tender. In the event of failure on the part of the successful Bidder to sign the agreement in the above- stipulated period, the EXIM Bank may cancel the order.</p>
	<p><b>b.</b> Until the Agreement is formally signed, the Work Order / Letter of Acceptance of Tender issued to the successful Bidder and accepted by him may be operative and binding on the EXIM Bank of India and the Service Provider.</p>
<b>12.0</b>	<b>Period of Validity of Bids</b>
	<ul style="list-style-type: none"> <li>• Prices and other terms offered by Bidders must be valid for an</li> </ul>

	<p>acceptance period of six months from the date of submission.</p> <ul style="list-style-type: none"> <li>• In exceptional circumstances the Bank may solicit the Bidders consent to an extension of the period of validity. The request and response thereto shall be made in writing.</li> </ul>
<b>13.0</b>	On acceptance of the tender, the name of the accredited representatives of the Bidder who would be responsible for taking instructions from EXIM Bank shall be mentioned by the Bidder.
<b>14.0</b>	If so, decided EXIM Bank reserves the right to appoint PMC (Project Management Consultant) or any other agency to get the quality of works checked, measurements recorded, including certification of bills etc.
<b>15.0</b>	The EXIM Bank has the right to reduce or increase the scope of work. The Bank may give 3 months' notice period for termination of contract if service is not satisfactory to the Bank.
<b>16.0</b>	<b>Notices to local bodies</b>
	The Bidder / Service Provider shall comply with and give all notices required under any law, rule, regulations or bye laws of parliament, state legislature or local authority relating to works.

I/We hereby declare that I/We have read and understood the above instructions for the guidance of the Bidders.

Sign:

Date:

Place

**E–TENDERING PROCESS COMPLIANCE STATEMENT**

The following terms and conditions are deemed as accepted by you for participation in the bid event (Tender Ref: EXIM/RFP/2022-23/03) - "Closed Request for Proposal (RFP) for Customer Relationship Management Solution for Export Import Bank of India"

1. The price once submitted cannot be changed.
2. Technical and other non-commercial queries (not impacting price) can be routed to the respective contact personnel of the EXIM Bank indicated in the tender document. Bidding process related queries could be addressed to M/s E-Procurement Technologies Ltd personnel indicated in the tender document.
3. Inability to bid due to glitch in telephone lines, Internet response issues, software or hardware hangs will not be the responsibility of M/s E-Procurement Technologies Ltd or the EXIM Bank. However, M/s E-Procurement Technologies Ltd, shall make every effort to ensure availability of technology resources to enable continuous bidding.
4. M/s E-Procurement Technologies Ltd does not take responsibility beyond the bid event. Order finalization and post order activities would be transacted directly between bidder and the EXIM bank.
5. Bids once made cannot be withdrawn or modified under any circumstances.
6. The EXIM Bank reserves the right to extend or reschedule or annul the e-tender process.
7. The bidders are advised to visit for any corrigendum etc.

I / We have read, understood and agree to abide by the e-tendering process compliance statement.

Date:

Organization Name:

Designation:

**BID SUBMISSION COVERING LETTER**

Note: This Bid Offer Covering letter should be on the letterhead of the Bidder and should be signed by an authorized person.

Mr. Kiran Patil  
Deputy General Manager,  
Export- Import Bank of India,  
21st Floor, Centre One, World Trade Centre,  
Cuffe Parade, Mumbai 400 005

Dear Sir,

**Ref: "Closed Request for Proposal (RFP) for Customer Relationship Management Solution for Export Import Bank of India " Ref. No: EXIM/RFP/2022-23/03**

i. With reference to the RFP, having examined and understood the instructions, terms and conditions forming part of the RFP.

ii. We agree and undertake that, if our Bid is accepted, we shall deliver, install and commission the CRM Application in accordance with the Requirements specified within the RFP within the timeframe specified, starting from the date of receipt of notification of award from The India EXIM Bank.

iii. We acknowledge having received the following addendum to the bid document:

Addendum No.	Dated

- All the details mentioned by us are true and correct and if Bank observes any misrepresentation of facts on any matter at any stage, Bank has the absolute right to reject the bid / proposal and disqualify us from the selection process.
- We confirm that the offer is in conformity with the terms and conditions as mentioned in RFP and it shall remain valid for 180 days from the last date of the acceptance of this bid.
- We undertake that, in competing for (and, if the award is made to us, in executing) the above contract, we will strictly observe the laws in force in India.
- We are also aware that the Bank has also right to re-issue / recommence the bid, to which we do not have right to object and have no reservation in this regard; the decision of The Bank in this regard shall be final, conclusive and binding upon us.
- We confirm that our company/system integrator/other partners participating in this bidding as part of the consortium have not been blacklisted/banned by a regulatory authority and any previous ban is not in force at present.

Dated this ..... day of ..... 2022

Yours faithfully,  
(Signature)

(In the capacity of) Duly authorized to sign bid for & on behalf of

(Name & Address of the Bidder)



**UNDERTAKING FROM THE BIDDER**

(To be submitted on Contractor's own Letterhead)

**To,**

Mr. Kiran Patil  
Deputy General Manager,  
Export- Import Bank of India,  
21st Floor, Centre One, World Trade Centre,  
Cuffe Parade, Mumbai 400 005

**Dear Sir,**

**Ref: "Closed Request for Proposal (RFP) for Customer Relationship Management Solution for Export Import Bank of India "**

**Ref. No:EXIM/RFP/2022-23/03**

I / we further agree to execute and complete the work within the time frame stipulated in the tender scope of document. I / we agree not to employ Sub Service Providers without the prior approval of the EXIM Bank.

I / We agree to pay Sales Tax, Works Contract Tax, Excise Tax, octroi, LBT, VAT, GST, Duties, all Royalties and all other applicable taxes prevailing and be levied from time to time on such items for which the same are liable and the rates quoted by me/us are Exclusive of the same.

I / we understand that you are not bound to accept the lowest tender or bound to assign any reasons for rejecting our tender. We unconditionally agree Exim Bank's preconditions as stipulated in the tender documents and empanelment process.

I / We agree that in case of my/our failure to execute work in accordance with the specifications and instructions received from the Exim Bank, during the course of the work, Exim Bank reserves the right to terminate my contract.

Yours truly,

Name:

Designation:

Seal:

**SELF - DECLARATION FOR COMPLIANCE****(On Company Letterhead)**

I < **Name**> working as < **Designation**> in < *M/s. Company Name* > hereby declare that I am entrusted with the responsibility of ensuring compliance with various laws applicable to the company in the Administration of business and affairs of the company.

After having examined and considered all relevant information and based on the information furnished by the concerned officers, I, do hereby certify that;

1. My company complied with all applicable laws, enactments, orders, rules, regulations, and other statutory requirements of the Central Govt. Of India, State Govt. and other statutory and local authorities concerning the business and affairs of the company.
2. Paid all applicable statutory dues on due dates.
3. Maintain proper registers, records, documents, and books and filed proper returns, forms and statements and furnished necessary particulars to the relevant authorities.
4. Not done or committed any act or entered any transactions in violation of any statutory provisions.
5. My company shall strictly follow and complied to Export Import Bank of India's policies, procedures, and security measures during contract period.
6. My company will produce all documents for verification process as per Exim Bank's requirement and various audit compliance.

**Date:****Authorised Signatory Name:****Place:****Designation:****Company Seal:**

**DECLARATION FOR ACCEPTANCE OF RFP TERMS AND CONDITIONS**

(Bidder's Letter Head)

To,  
The Deputy General Manager  
Export Import Bank of India  
Floor 21, Center 1 Building  
World Trade Center, Cuffe Parade  
Mumbai - 400005

Dear Sir,

I have carefully gone through the Terms & Conditions contained in the RFP document for selection of vendor for Request for Proposal for "Closed Request for Proposal (RFP) for Customer Relationship Management Solution for Export Import Bank of India "- RFP No. EXIM/RFP/2022-23/03 dated --.-- .2022. I declare that all the provisions of this RFP/Tender Document are acceptable to my company. I further certify that I am an authorized signatory of my company and am, therefore, competent to make this declaration.

Yours faithfully,

(Signature of the Bidder)

Printed Name

Designation

Seal

Date:

Business Address:

**DECLARATION FOR ACCEPTANCE OF SCOPE OF WORK**

(Bidder's Letter Head)

To  
The Deputy General Manager  
Export Import Bank of India  
Floor 21, Center 1 Building  
World Trade Center, Cuffe Parade  
Mumbai - 400005

Dear Sir,

I have carefully gone through the "Scope of Work" contained in the RFP "Closed Request for Proposal (RFP) for Customer Relationship Management Solution for Export Import Bank of India " - RFP No. EXIM/RFP/2022-23/03 dated --.---.2022.

We hereby convey our absolute, unconditional and unqualified acceptance for the work and activities as per the Scope of Work and other terms and conditions mentioned in the subject RFP.

I further certify that I am an authorized signatory of my company and am, therefore, competent to make this declaration.

Yours faithfully,

(Signature of the Bidder)

Printed Name

Designation

Seal

Date:

Business Address:

**DECLARATION FOR CLEAN TRACK RECORD**

**(Bidder's Letter Head)**

To  
The Deputy General Manager  
Export Import Bank of India  
Floor 21, Center 1 Building  
World Trade Center, Cuffe Parade  
Mumbai – 400005

Dear Sir,

I have carefully gone through the Terms & Conditions contained in the RFP document for selection of vendor for Request for Proposal for "Closed Request for Proposal (RFP) for Customer Relationship Management Solution for Export Import Bank of India "- RFP No. EXIM/RFP/2022-23/03 dated --.-- .2022. I hereby declare that my company has not been debarred/blacklisted by any Government / Semi Government / BFSI sector organizations/ Private organizations in India / abroad. I further certify that I am competent officer and duly authorized by my company to make this declaration.

Yours faithfully,

(Signature of the Bidder)

Printed Name

Designation

Seal

Date:

Business Address:

**IMPLEMENTATION METHODOLOGY**  
**(Presentation and CRM project details)**

Sl. No.	Details of methodology / approach
1	The methodology section should adequately address the following stages of the project:
i	Frequency and approach for periodic reporting on the progress of the project and actual status vis à vis scheduled status
ii	Detailed Study of Current State, with detailed work steps and deliverables
iii	Gap analysis including identification and resolution of gaps
iv	Customization, development and necessary work around
v	Building up of interfaces with the applications used by the Bank
vi	Setting up of the platform and deploying the CRM Application for SIB/ Other relevant applications.
vii	SIT, User acceptance testing, Performance testing
viii	Pre-Go-live Audit, Data Migration audit, VAPT, Delivery Audit
ix	Planning for rollout and identification of key issues that may arise along with proposed solutions
2	Timelines
3	Project management activities
4	Roles and responsibilities of proposed personnel both from the vendor and Bank end.
5	Following details with respect to the methodology followed by the vendor in Project Management for a Public/Private Sector Bank
i	Project Name
ii	Project Location
iii	Client Name
iv	Client address
v	Client contact/reference person(s)
vi	Project started (month/year)
vii	Project elapsed time – months
viii	Man, months effort
ix	Project Size (No of branches, modules covered and any other relevant details)
x	Name of senior project staff
xi	Nature of the Project
xii	Project Management Methodology used
xiii	Role of the Bidder, whether complete end to end involvement or for a particular module
xiv	Project detail (Broad detail – information about all activities handled, modules forming part of the Project of the Client Bank, associated activities, timelines, Activity wise and module wise may be detailed.)

**PAST EXPERIENCE**

List of major customers where the proposed solutions have been implemented/under implementation and their reference details

Sr.No	Name and complete postal address of customer	Customer Contact Details (Name, Designation, Email, Phone, Mobile Number)	Project Status (Completed/Under Implementation, Start Date, End Date)

The above details will be used for reference check/feedback.

Signature of Authorized Signatory

Name of Signatory:

Designation:

Email ID:

Mobile No:

Telephone No.:

**BILL OF MATERIAL**

<b>Sr No</b>	<b>Description</b>	<b>Quantity</b>
<b>1</b>	CRM Solution License/Subscription (with 1 <sup>st</sup> year warranty/subscription)	1
<b>2</b>	One Time Implementation Cost	1
<b>3</b>	Annual Maintenance Cost post warranty for 2 <sup>nd</sup> year	1
<b>4</b>	Annual Maintenance/Subscription cost for 3 <sup>rd</sup> Year	1
<b>5</b>	Annual Maintenance/Subscription cost for 4 <sup>th</sup> Year	1
<b>6</b>	Annual Maintenance/Subscription cost for 5 <sup>th</sup> Year	1
<b>7</b>	Customization charges per man days (applicable after project sign off changes and freezing of BRD) - rate fixed for 5 years	
<b>8</b>	On Site L2 resource cost per month (after post go live)	1
<b>9</b>	Percentage of increase in resource cost after every 12 months	1



**COMMERCIAL PROPOSAL**

Sr No	Description	Quantity	*Unit Price Price (₹)	*Total Price (₹)
1	CRM Solution along with any orchestration layer (for api integration) License with 1 year warranty	1		
2	One Time Implementation Cost	1		
3	Annual Maintenance Cost post warranty for 2 <sup>nd</sup> year	1		
4	Annual Maintenance/Subscription cost for 3 <sup>rd</sup> Year	1		
5	Annual Maintenance/Subscription cost for 4th Year	1		
6	Annual Maintenance/Subscription cost for Year 5th Year	1		
7	Customization charges per man days (applicable after project sign off changes and freezing of BRD) - rate fixed for 5 years	1		
8	On Site L2 resource cost per month (after post go live)	1		
<b>Total Cost in Rs.</b>				
9	Percentage of increase in resource cost after every 12 months	1		

## Notes:

1. Quoted price should be exclusive of all taxes and duties.
2. Bidder should input percentage of increase in resource cost after every 12 months between 8% to 20%.
3. Only point number 1 to 8 will be considered for arriving at relative financial score
4. The bidder shall meet the requirements of Goods & Services Tax (GST)
5. The licenses provided should consider internal users count as minimum 1000 and unlimited customers for arriving at solution cost either perpetual or subscription on cloud/on prim model. The Bank will not bear any cloud charges like hosting/bandwidth/firewall/ WAF etc.

**CUSTOMER SATISFACTION CERTIFICATE**

To,  
Mr. Kiran Patil  
Deputy General Manager  
Export- Import Bank of India, 21st Floor, Centre One,  
World Trade Centre,  
Cuffe Parade, Mumbai 400 005

Sir,

Reg.: RFP for CRM Solution

This is to certify **<company Name with Address>** has supplied/implemented Complete CRM solution originally developed by **<OEM name>** in our organization since **<Month and Year>**.

The CRM solution is running successfully in our organization and the services of **<company Name >** are satisfactory.

The certificate has been issued on the specific request of the **<company Name >**.

Signature of Authorized Signatory

Name of Signatory:

Designation:

Email ID:

Mobile No:

Telephone No.:

**<seal of Bank/Client>**

Place:

Date:

**ELIGIBILITY CRITERIA OF THE BIDDER**

Following format has to be filled by the Bidder and has to be submitted along with technical bid and relevant documentary proof.

Sr.No	ELIGIBILITY CRITERIA	SUPPORTING DOCUMENTS TO BE SUBMITTED
1	The solution provider should have valid GST and PAN Number.	
2	The solution provider should have a valid registration number.	
3	Documents uploaded as per document checklist	

Note:

1. Documentary proof, sealed and signed by authorized signatory, must be submitted
2. Proposal of the bidders are liable to be rejected in case of incomplete information or wrong information or non-submission of documentary proof.

**STATEMENT OF NIL DEVIATIONS**

(To be submitted in the Bidder's letterhead)

To,  
Mr. Kiran Patil,  
Deputy General Manager,  
Export- Import Bank of India, 21st Floor, Centre One,  
World Trade Centre,  
Cuffe Parade, Mumbai 400 005

Re: Tender RFP Ref: \_\_\_\_\_

Dear Sir,

There are no deviations (nil deviations) from the terms and conditions of the tender. All the terms and conditions of the tender are acceptable to us.

Yours faithfully,  
(Authorized Signatory of Bidder)

Date:

(Company Seal)

**LETTER OF COMPETENCE FORMAT**

[To be executed on a Rs 100 non-judicial stamp paper]

Letter of Competence for Quoting against EXIM BANK's

RFP No. /....." Closed Request for Proposal (RFP) for Customer Relationship Management Solution for Export Import Bank of India "

This is to certify that we [Insert name of Bidder], Address... are fully competent to undertake and successfully deliver the scope of services mentioned in the above RFP. This recommendation is being made after fully understanding the objectives of the project and requirements like experience etc.

We certify that the quality and number of resources to be deployed by us for implementation will be adequate to implement the connectivity expeditiously and correctly and provide the services professionally and competently.

We also certify that all the information given by in response to this RFP is true and correct.

Authorised Signatory of the Bidder

Date :

**NON – DISCLOSURE AGREEMENT**

[100 Rs non judicial stamp paper]

**This Agreement** is made on the \_\_\_\_\_ day of \_\_\_\_\_ by and between \_\_\_\_\_, (an \_\_\_\_\_ incorporated under the \_\_\_\_\_) having its office at \_\_\_\_\_ (hereinafter referred to as “\_\_\_\_\_” or the “**Receiving Party**”, which expression unless repugnant to the context or meaning thereof be deemed to include its successors and assigns) of the **ONE PART**;

**AND**

**Export-Import Bank of India**, a corporation established under the Export-Import Bank of India Act, 1981 and having its Head Office at Floor 21, Centre One Building, World Trade Centre Complex, Cuffe Parade, Mumbai 400 005 and one of its Regional Office at \_\_\_\_\_ hereinafter referred “EXIM” or “**Disclosing Party**”) which expression unless repugnant to the context or meaning thereof be deemed to include its successors and assigns) of the **OTHER PART**.

\_\_\_\_\_ & EXIM are hereinafter collectively referred to as the “**Parties**” and individually as a “**Party**”.

**WHEREAS**

The Parties intend to engage in a business relationship which includes \_\_\_\_\_. In the course of such business relationship, it is anticipated that EXIM may disclose or deliver to \_\_\_\_\_ certain or some of its trade secrets, policies, technical and business information, pricing, financial analysis, customer names, customer list, customer data or any other confidential or proprietary information, for the purpose of \_\_\_\_\_ (hereinafter referred to as “**the Purpose**”).

**NOW, THEREFORE, THIS AGREEMENT WITNESSETH AND IT IS HEREBY AGREED BY AND BETWEEN THE PARTIES HERETO AS FOLLOWS:**

1. **Confidential information**: For the purposes of this Agreement, “Confidential Information” means any and all information or data that is proprietary to the Disclosing Party and not generally known to the public, whether in tangible or intangible form, in whatever medium provided by the Disclosing Party to the Receiving Party or its representative(s) in connection with the Purpose and the business transacted/to be transacted between the Parties. Confidential Information shall include any copy, abstract, sample, notes or module thereof. The Receiving Party shall use the Confidential Information solely for and in connection with the

Purpose.

Notwithstanding the foregoing, "Confidential Information" shall not include any information which the Receiving Party can show: (a) is now or subsequently becomes legally and publicly available without breach of this Agreement by the Receiving Party, (b) was rightfully in the possession of the Receiving Party without any obligation of confidentiality prior to receiving it from the Disclosing Party and can be shown by documentary evidence in support thereof, (c) was rightfully obtained by the Receiving Party from a source other than the Disclosing Party without any obligation of confidentiality and can be shown by documentary evidence in support thereof, (d) was developed by or for the Receiving Party independently and without reference to any Confidential Information and such independent development can be shown by documentary evidence, or (e) is disclosed pursuant to an order of a court or governmental agency as so required by such order, provided that the Receiving Party shall endeavour to, unless prohibited by law or regulation, promptly notify the Disclosing Party of such order and afford the Disclosing Party the opportunity to seek appropriate protective order relating to such disclosure.

2. **Non-disclosure:** The Receiving Party shall not commercially use or disclose any Confidential Information to any other person or entity other than persons in the direct employment of the Receiving Party who have a need to have access to and knowledge of the Confidential Information solely for the Purpose authorized above. The Receiving Party may with prior written permission of the Disclosing Party, disclose the Confidential Information to its affiliates, consultants, advisors and such other persons who have a need to have access to and knowledge of the Confidential Information solely for the Purpose authorized above, subject to their entering into an agreement containing terms and conditions no less restrictive than as set out in this Agreement. The Receiving Party agrees to notify the Disclosing Party immediately if it learns of any use of disclosure of the Disclosing Party's Confidential Information in violation of the terms of this Agreement. The Receiving Party undertakes to take full responsibility for the Confidential Information given to their Consultants, Advisors, Affiliates and other persons referred in above and consequently any breach by such Consultants, Advisors Affiliates and other persons referred in above shall be treated as breach by the Receiving Party and accordingly will be liable to the Disclosing Party.
3. **Publications:** Neither Party shall make news releases, public announcements, give interviews, issue or publish advertisements or publicize in print or electronic media or any other manner whatsoever in connection with this Agreement, the contents/provisions thereof, other information relating to this Agreement, the Purpose, the Confidential Information or other matter of this Agreement, without the prior written approval of the other Party.
4. **Term:** This Agreement shall be effective from the date hereof and shall continue till the earlier to occur of (i) the expiration of 1 (one) year from the date of this Agreement unless renewed by both the parties in writing and (ii) till expiration or termination of this Agreement due to cessation of the business relationship between \_\_\_\_\_ and EXIM. However, the confidentiality

obligations shall survive the termination of this Agreement. Upon expiration or termination as contemplated herein the Receiving Party shall immediately, cease any and all disclosures or uses of the Confidential Information and at the request of the Disclosing Party promptly return or destroy all written, graphic or other tangible forms of the Confidential information and all copies, abstracts, extracts, samples, notes or modules thereof. That portion of the Information which consists of analyses, compilations, studies or other documents or data prepared by the Receiving Party or its representatives, will continue to be held by the Receiving Party and will be treated as confidential.

5. **Title and Proprietary Rights:** Notwithstanding the disclosure of any Confidential Information by the Disclosing Party to the Receiving Party, the Disclosing Party shall retain title and all intellectual property and proprietary rights in the Confidential Information. No license under any trademark, patent or copyright, or application for same which are now or thereafter may be obtained by such Party is either granted or implied by the conveying of Confidential Information. The Receiving Party shall not conceal, alter, obliterate, mutilate, deface or otherwise interfere with any trademark, trademark notice, copyright notice, confidentiality notice or any notice of any other proprietary right of the Disclosing Party on any copy of the Confidential Information, and shall reproduce any such mark or notice on all copies of such Confidential Information. Likewise, the Receiving Party shall not add or emboss its own or any other any mark, symbol or logo on such Confidential Information.
6. **Return of Confidential Information:** Upon written demand of the Disclosing Party, the Receiving Party shall (i) cease using the Confidential Information,  
(ii) return the Confidential Information and all copies, abstract, extracts, samples, notes or modules thereof to the Disclosing Party within seven (7) days after receipt of notice, and (iii) upon request of the Disclosing Party, certify in writing that the Receiving Party has complied with the obligations set forth in this agreement.
7. **Remedies:** Both parties acknowledge that the Confidential Information to be disclosed hereunder is of a unique and valuable character, and that the unauthorized dissemination of the Confidential Information would destroy or diminish the value of such information. The Receiving Party acknowledges that if the Receiving Party fails to comply with any of its obligations hereunder, the Disclosing Party may suffer immediate, irreparable harm for which monetary damages may not be adequate. The Receiving Party agrees that, in addition to all other remedies provided at law or in equity, the Disclosing Party shall be entitled to injunctive relief hereunder.
8. **Entire Agreement, Amendment, and Assignment:** This Agreement constitutes the entire agreement between the Parties relating to the matters discussed herein and supersedes any and all prior oral discussions and/or written correspondence or agreements between the Parties. This Agreement may be amended or modified only with the mutual written consent of the Parties. Neither this Agreement nor any right granted hereunder shall be assignable or otherwise transferable.



9. **Notices:** Any notice or other communication under this Agreement shall be in writing and shall be delivered personally, or sent by pre-paid first class post or recorded delivery or by commercial courier or by electronic mail, to a party at its address as set out below:

Disclosing Party: Export – Import Bank of India

Receiving Party: \_\_\_\_\_

or as otherwise specified by a party by notice in writing to the other party.

Any notice or other communication shall be deemed to have been duly received:

- i. if delivered personally, when left at the address and for the contact referred to in this clause; or
- ii. if sent by pre-paid first-class post or recorded delivery, at 11.00 am on the fourth business day after posting; or
- iii. if delivered by commercial courier, on the date and at the time that the courier's delivery receipt is signed; or
- iv. if sent by an electronic mail, on the day of receipt, if received before 11.00 a.m on a business day, or otherwise on the first business day after receipt.

10. **Governing Law and Jurisdiction:** The provisions of this Agreement shall be governed by the laws of India and the parties submit to the jurisdiction of courts/tribunals at Mumbai.

11. **General:** The Receiving Party shall not reverse-engineer, decompile, disassemble or otherwise interfere with any Confidential Information disclosed hereunder.

All Confidential Information is provided on “as is” basis. In no event shall the Disclosing Party be liable for the inaccuracy or incompleteness of the Confidential Information. None of the Confidential Information disclosed by the Parties constitutes any representation, warranty, assurance, guarantee or inducement by either Party to the other with respect to the fitness of such Confidential Information for any particular purpose or infringement of trademarks, patents, copyrights or any right of third persons. Each party agrees to maintain and go by all the extant laws, regulatory guidelines and such other similar regulations.

**IN WITNESS WHEREOF**, the parties hereto have executed this Agreement as of the date first above written.

Disclosing Party

Receiving Party

By \_\_\_\_\_

By \_\_\_\_\_

Name:

Name:

Title:

Title:

**INTEGRITY PACT**

[500 Rs non judicial stamp paper]

Between

Export-Import Bank of India (EXIM BANK) hereinafter referred to as **“The Principal”**,

And

..... hereinafter referred to as **“The Bidder/ Contractor”**

**Preamble**

The principal intends to award, under laid down Organizational procedures, contract/s for “Closed Request for Proposal (RFP) for Customer Relationship Management Solution for Export Import Bank of India”. The Principal values full compliance with all relevant laws of the land, rules, regulations, economic use of resources and of fairness / transparency in its relations with its Bidder(s) and / or Contractor(s).

In order to achieve these goals, the principal will appoint Independent External Monitors (IEMs) who will monitor the tender process and the execution of the contract for compliance with the Principles mentioned above.

**Section 1 - Commitments of the Principal**

- (1) The Principal commits itself to take all measures necessary to prevent corruption and to observe the following principles: -
  - a. No employee of the Principal, personally or through family members, will in connection with the tender for, or the execution of a contract, demand; take a promise for or accept, for self or third person, any material or immaterial benefit which the person is not legally entitled to.
  - b. The Principal will, during the tender process treat all Bidder(s) with equity and reason. The Principal will in particular, before and during the tender process, provide to all Bidder(s) the same information and will not provide to any Bidder(s) confidential / additional information through which the Bidder(s) could obtain an advantage in relation to the tender process or the contract execution.
  - c. The Principal will exclude from the process all known prejudiced persons.
- (2) If the Principal obtains information on the conduct of any of its employees which is a criminal offence under the IPC/PC Act, or if there be a substantive Suspicion in this regard, the Principal will inform the Chief Vigilance Officer and in addition can initiate disciplinary actions.

## **Section 2 - Commitments of the Bidder(s)/ Contractor(s)**

- (1) The Bidder(s) / Contractor(s) commit themselves to take all measures necessary to prevent corruption. The Bidder(s) / Contractor(s) commit themselves to observe the following principles during participation in the tender process and during the contract execution.
- a. The Bidder(s)/ Contractor(s) will not, directly or through any other person or firm, offer, promise or give to any of the Principal's employees involved in the tender process or the execution of the contract or to any third person any material or other benefit which he/she is not legally entitled to, in order to obtain in exchange any advantage of any kind whatsoever during the tender process or during the execution of the contract.
  - b. The Bidder(s)/ Contractor(s) will not enter with other Bidders into any undisclosed agreement or understanding, whether formal or informal. This applies in particular to prices specifications, certifications, subsidiary contracts, submission or non-submission of bids or any other actions to restrict competitiveness or to introduce cartelization in the bidding process.
  - c. The Bidder(s)/ Contractor(s) will not commit any offence under the relevant IPC/PC Act; further the Bidder(s)/ Contractor(s) will not use improperly, for purposes of competition or personal gain, or pass on to others, any information or document provided by the principal as part of the business relationship, regarding plans, technical proposals and business details, including information contained or transmitted electronically.
  - d. The Bidder(s)/ Contractors(s) of foreign origin shall disclose the name and address of the Agents/representatives in India, if any. Similarly, the Bidder(s)/ Contractors(s) of Indian Nationality shall furnish the name and address of the foreign principals, if any.
  - e. The Bidder(S)/ Contractor(s) will, when presenting their bid, disclose any and all payment made, are committed to or intends to make to agents, brokers or any other intermediaries in connection with the award of the contract.
  - f. Bidder(s)/Contractor(s) who have signed the Integrity Pact shall not approach the Courts while representing the matter to IEMs and shall wait for their decision in the matter.
- (2) The Bidder(s)/ Contractor(s) will not instigate third person to commit offences outlined above or be an accessory to such offences.

## **Sanction 3 - Disqualification from tender process and exclusion from future contracts**

If the Bidder(s)/ Contractor(s), before award or during execution has committed a transgression through a violation of Section 2, above or in any other form such as to put their reliability or credibility in question, the Principal is entitled to disqualify the bidder(s)/ Contractors(s) from the tender process.

#### **Sanction 4 – Compensation for Damages**

- (1) If the principal has disqualified the Bidder(s) from the tender process prior to the award according to Section 3, the Principal is entitled to demand and recover the damages equivalent to Earnest Money Deposit/Bid Security.
- (2) If the Principal has terminated the contract according to Section 3, or if the Principal is entitled to terminate the contract according to Section 3, the Principal shall be entitled to demand and recover from the Contractor liquidated damages of the Contract value or the amount equivalent to Performance Bank Guarantee.

#### **Section 5 - Previous transgression**

- (1) The Bidder declares that no previous transgressions occurred in the last three years with any other Company in any country conforming to the anti-corruption approach or with any Public Sector Enterprise in India that could justify his exclusion from the tender process.
- (2) If the Bidder makes incorrect statement on this subject, he can be disqualified from the tender process.

#### **Section 6 — Equal treatment of all Bidders / Contractors / Subcontractors**

- (3) In ease of Sub-contracting, the Principal Contractor shall take the responsibility of the adoption of Integrity Pact by the Sub-contractor.
- (4) The Principal will enter into agreements with identical conditions as this one with all Bidders and Contractors.
- (5) The Principal will disqualify from the tender process all bidders who do not sign this Pact or violate its provisions.

#### **Section 7 - Criminal charges against violating Bidder(s) / Contractor(s) / Subcontractor(s)**

If the Principal obtains knowledge of conduct of a Bidder, Contractor or Subcontractor, or of an employee or a representative or an associate of a Bidder, Contractor or Subcontractor which constitutes corruption, or if the Principal has substantive suspicion in this regard, the Principal will inform the same to the Chief Vigilance Officer.

#### **Section 8 - Independent External Monitor**

- (1) The Principal has appointed competent and credible Independent External Monitor for this Pact after approval by Central Vigilance Commission. Names and Addresses of the Monitors are given below;

Mrs. Anita Chaudhary IAS (Retd.), Block T, 28/11, DLF III, Gurgaon-122002 Email: <a href="mailto:IEM@eximbankindia.in">IEM@eximbankindia.in</a>	Mrs. Rajni Sekhri Sibal IAS(Retd.), House No-G-9, Second Floor Maharani Bagh, New Delhi-110065 Email: <a href="mailto:IEM@eximbankindia.in">IEM@eximbankindia.in</a>
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The task of the Monitor is to review independently and objectively, whether and to what extent the parties comply with the obligations under this agreement.

- (2) The Monitor is not subject to instructions by the representatives of the parties and performs his/her functions neutrally and independently. The Monitor would have access to all Contract documents, whenever required. It will be obligatory for him / her to treat the information and documents of the Bidders/Contractors as confidential. He/ she reports to the Managing Director (MD), EXIM BANK.
- (3) The Bidder(s)/Contractor(s) accepts that the Monitor has the right to access without restriction to all Project documentation of the Principal including that provided by the Contractor. The Contractor will also grant the Monitor, upon his/her request and demonstration of a valid interest, unrestricted and unconditional access to their project documentation. The same is applicable to Sub-contractors.
- (4) The Monitor is under contractual obligation to treat the information and documents of the Bidder(s)/ Contractor(s)/ Sub-contractor(s) with confidentiality. The Monitor has also signed declarations on 'Non-Disclosure of Confidential Information' and of 'Absence of Conflict of Interest'. In case of any conflict of interest arising later, the IEM shall inform Managing Director (MD), EXIM BANK and recuse himself / herself from that case.
- (5) The Principal will provide to the Monitor enough information about all meetings among the parties related to the Project provided such meetings could have an impact on the contractual relations between the Principal and the Contractor. The parties offer to the Monitor the option to participate in such meetings.
- (6) As soon as the Monitor notices, or believes to notice, a violation of this agreement, he/she will so inform the Management of the Principal and request the Management to discontinue or take corrective action, or to take other relevant action. The monitor can in this regard submit non-binding recommendations. Beyond this, the Monitor has no right to demand from the parties that they act in a specific manner, refrain from action or tolerate action.

- (7) The Monitor will submit a written report to the Managing Director (MD), EXIM BANK within 8 to 10 weeks from the date of reference or intimation to him by the Principal and, should the occasion arise, submit proposals for correcting problematic situations.
- (8) If the Monitor has reported to the Managing Director (MD), EXIM BANK, a substantiated suspicion of an offence under relevant IPC/ PC Act, and the Managing Director (MD), EXIM BANK has not, within the reasonable time taken visible action to proceed against such offence or reported it to the Chief Vigilance Officer, the Monitor may also transmit this information directly to the Central Vigilance Commissioner.
- (9) The word '**Monitor**' would include both singular and plural.

## **Section 9 - Pact Duration**

This Pact begins when both parties have legally signed it. It expires for the Contractor 12 months after the last payment under the contract, and for all other Bidders 6 months after the contract has been awarded. Any violation of the same would entail disqualification of the bidders and exclusion from future business dealings.

If any claim is made / lodged during this time, the same shall be binding and continue to be valid despite the lapse of this pact as specified above, unless it is discharged / determined by Managing Director (MD) of EXIM BANK.

## **Section 10 - Other provisions**

- (1) This agreement is subject to Indian Law. Place of performance and jurisdiction is the Registered Office of the Principal, i.e. Mumbai.
- (2) Changes and supplements as well as termination notices need to be made in writing. Side agreements have not been made.
- (3) If the Contractor is a partnership or a consortium, this agreement must be signed by all partners or consortium members.
- (4) Should one or several provisions of this agreement turn out to be invalid, the remainder of this agreement remains valid. In this case, the parties will strive to come to an agreement to their original intentions.
- (5) Issues like Warranty / Guarantee etc. shall be outside the purview of IEMs.
- (6) In the event of any contradiction between the Integrity Pact and its Annexure, the Clause in the Integrity Pact will prevail.

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(For & On behalf of the Principal)  
(Office Seal)

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(For & On behalf of Bidder/Contractor)  
(Office Seal)

Place \_\_\_\_\_

Date \_\_\_\_\_

Witness 1:

(Name & Address)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Witness 2:

(Name & Address)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**PROPOSED SOLUTION LICENSING MODEL AND UPGRADES**

	Licensing Model & Upgrades	Response
1	Specify different Licensing Model of the CRM Application (Enterprise/User License/Both).	
2	No separate licenses shall be needed in DR & UAT environments.	
3	Specify Nature of License (Perpetual/Subscription)	
4	Any separate master agreement to be executed with OEM for Licensing?	
5	Specify Model of Solution Upgrade & Mobile Client for next 5 years post expiry of warranty	
6	All product upgrades can be implemented in DC/DR sites without any additional cost to bank during AMC period	
7	Whether all security updates based on Audit from Regulatory/External agencies shall be provided without any additional cost	



**PROPOSED SOLUTION GENERAL ARCHITECTURE DETAILS**

	Architecture/General	Response
1	Specify the model of deployment of the solution (On Premise/Cloud). If the proposed solution is supporting in Cloud and On-Premises models, it can be mentioned separately in response.	
2	Detailed list of OS / DB/ Middleware/ Webserver /Application Platform & any other supporting software/license to be procured by Bank for implementation	
3	Specify Hardware Specifications needed with Architecture Diagram, Network Diagram, Schema Design, and Functional Specification Document of the solution for proposed implementation. (In hardware details, Mention the no of CPU Cores, memory etc).	
4	Specify the Web Server, Application Platform & DB Details	
5	Maximum memory used by the application in Client Side	
6	Product Customization Certification Training shall be provided by OEM	
7	Specify Client Machine configuration required to access CRM Solution smoothly.	
8	Specify List of Supported Browsers for accessing the solution with Base version details in each browser (IE, Chrome, and Mozilla Firefox).	
9	Specify the End of Life of present version of software proposed.	
10	Specify the mode of Data Security of the application available	
11	Ability to encrypt Personal Identifiable information (PII) of Customer Data in Database	
12	Availability of custom web portal from CRM Application which can be deployed in DMZ server & intranet zone for Lead Creation, Complaint Management & Campaign Management.	

**TECHNICAL COMPLIANCE**

A	Lead Module	Compliance (Complied/Non-Complied/ Customization)	Remark
1	Ability to generate leads for Customers and Non-Customers (Prospects).		
2	Ability to create leads in CRM from different channels like Mobile Application, SMS, Email, Social Media, Chabot, Bank's internal portal etc through API's.		
3	Ability to perform Omni Channel Lead management		
4	Ability to incorporate Lead Generation (LG) and Lead Conversion (LC) concept in the Lead Management Module.		
5	Ability to assign the Lead Ownership to CRM users based on business logic.		
6	Ability to auto assign leads based on business rules or configuration on Product Wise /Category/Customer Group wise etc.		
7	Ability to create Lead Lifecycle/Workflow based on Product or any other field in lead entity.		
8	Ability to generate and push lead notification to CRM users (Lead Owner/Generator, Lead Converter/Supervisor) through SMS, Email Channel on real time basis.		
9	Ability to generate SMS/Email notification to customer on lead creation, lead closure and on different stages of lead process based on lead workflow configuration.		
10	Ability to configure Lead TAT Escalation based on Product Category.		
11	Ability to attach documents by CRM users for any lead.		
12	Ability to show customer interactions (happening from different channels like Email,SMS,Chat,WebSite,IVR) of a lead in a single view of Lead Screen to bring an Omni Channel Experience		
13	Ability to assign the lead ownership based on the Lead TAT Escalation mechanism.		
14	Ability of auto-closure of Leads by integrating with different subsystems like CBS, BPM (Workflow Software), Third Party		

	Applications in real time and batch mode of integration.		
15	Differentiator to identify a lead is closed manually by any CRM user or auto closed by the software.		
16	Lead Creation, Closure and Processing API availability.		
17	Ability to track lead using any of the lead identifiers such as Lead ID, Customer ID, Mobile Phone, Email etc.		
18	Email Integration Capability for Lead Creation with Mailbox		
19	Lead Integration capability with SMS Gateway		
20	Lead Email Tracking ability & mailbox folder tracking option for lead generation		
21	Ability to generate dynamic reports on lead module & option to export the result set into different formats like docx, pdf etc.		
22	Option configure de-duplication check on lead creation using business logic shared by the Bank based on any field in Lead Object in configurable mode.		
23	Ability to do text mining and NLP processing for processing leads getting created through Email Channel.		
24	Ability to configure lead visibility based on User Role/Organization Hierarchy or Team wise.		
25	Maker/Checker functionality in Lead Processing in configurable mode based on product.		
26	Ability for bulk import of leads from feed file/excel file by privileged CRM users from GUI.		
27	Availability of Document Repository for Lead Module to be available for CRM user's like executives/officers with keyword based content tagging and search ability		
28	Ability to configure the Bulk Import Leads fields from GUI.		
29	Suitable provision to Share & engage the leads with another team without change of ownership. Suitable permissions to EDIT/VIEW provision will also be required to initiate them on a need basis.		

30	Lead scoring functionality: Ability to mark scoring on leads generated for Customer/Non Customers. For example, leads scoring logic can be based on CUSTOMER PROFITABILITY INDEX/Customer Worth, Transaction history, Internal Rating, vintage criteria etc. for customers and for the Non Customers it can be based on previous interactions, on AI inputs, income criteria/profession/line of business, based on any field inputs etc.		
31	Ability to provide system generated Next Best Action prompt on leads based on ML/AI triggers, previous interactions, lead scoring , etc.		
32	Ability to configure lead process cycle like creation of a process master for the entire lead		
33	Activity Management & Tracking: Provision to set up different tasks such as, phone call, appointments, meetings, e-mail etc. Further to this, facility to modify the status of the all the pending activities like meeting/appointment etc.		
34	Alert/Notification: Notification functionality on the scheduled activity to any crm user, prior to the scheduled date & time.		
35	Ability to set lead ownership based on product basis , or in Round Robin pattern if multiple users are available in a team with option to configure the logic in application by Sales Team		
36	Availability of Audit trails to identify all the modifications (in field level and data level) done in a lead.		
37	Data quality check is in-built into the system and data governance is part of this module.		
<b>B</b>	<b>Customer Service Management</b>		
1	Ability to create Service request for Customers as well as Non-Customers		
2	De-duplication check on Service Request based on Service Request Category or any other field present in the Service Request screen.		
3	Ability to configure Service Request Lifecycle/Workflow		
4	Ability to create Service Request from different channels like Email, SMS, Website, Social Media, IVR, Chatbot, RBI CMS Portal,		

	or any other channel by integrating via API/DB call/Gateway protocols.		
5	Ability to perform Omni Channel Customer Service Management.		
6	Ability to configure Owner team for service request based on any field in the Case object. (Eg:ProductWise/ Nature of Complaint /Channel of complaint etc)		
7	Ability to route / auto assign Rejected Complaints to Internal Ombudsman Team/Any other internal team.		
8	Maker/Checker functionality in Service Request Processing.		
9	Ability to auto-escalate as well as manual escalation of service request to different teams based on TAT		
10	Ability to escalate complaint created in one channel (e.g.: Email, SMS) from another channel. (eg: Website, IVR)		
11	Ability to create escalation matrix for service request based on Category of the Complaint.		
12	SMS and Email Notification to CRM user(Owner, Supervisor) on case creation and case escalation		
13	Ability to assign service request manually to any user/team and automatically using pre-configured rules based on Complaint Category/Product.		
14	Availability of Native APIS for Service Req Creation/Closure/Processing		
15	Ability to generate dynamic reports on service request & option to export the result set into different formats like excel, pdf etc.		
16	Ability to send email, sms notification on different stages of service request processing from Application (To be sent from Server directly with email threading)		
17	Ability of configuring Holiday Master in Service Module for considering the TAT for complaint		
18	Ability to create a child case/service request within the Primary case/Service request. (Scenario: Along with a major compliant customer will be mentioning other queries/ complaints associated with the product/service which shall be created as a subset of primary complaint. Post creation of child case this will be assigned to team which need to provide resolution. Once resolution		

	is received in CRM primary case would be resolved post reverting to customer by case owner).		
19	Ability to provide Notification for user/ case owner when a new mail is attached to existing open case/complaint from customer.		
20	Ability to identify service requests / complaints made by same customer for an issue even when these are made through different channels.		
21	Ability to include all inter-departmental communications/ remarks within the module.		
22	Data quality check is in-built into the system and data governance is part of this module.		
<b>C</b>	<b>Customer 360 View</b>		
1	Consolidated Single Snapshot View to see all the customer relationship by fetching data from different subsystems like CBS, Sharepoint intranet site, Email, SMS Gateway etc		
2	Capability to display On Demand data by integrating with other solutions like CBS(Finacle 10), Sharepoint intranet site, & Chat Bot etc via API/DB Call.		
3	Display of all the Product Holdings & Services Availed by the customer in Customer 360 screen		
4	Customer Profile Generation from Customer 360 module.		
5	Data Capture and Display all customer interactions irrespective of channels of communication (Leads, service request, email communication, Chat, campaign targeted) in 360 view itself via API's, Manual Mode & DB Call's.		
6	Capability to drill down the customer details from 360 View.		
7	Detailed View of Account Holdings (Loans, BG's, LC's etc) of a customer in Customer 360 module.		
8	Drill down option from Customer 360 screen to Detailed View screens.		

9	Search Option/Filter options from the Customer Database using any of the customer data field (Advanced Find) & ability to export the result set to different formats like excel, pdf etc.		
10	Provision for digital KYC Compliance with option to upload the necessary OVD document and capture KYC fields by CRM Users and perform validation based on the document type with maker checker provision.		
11	Audit Trail of Contact Information in Customer 360 which shall be configurable on field wise manner.		
12	Capability to create and manage lead & service request directly in Customer 360 view.		
13	Capability to show the leads/cases/campaign details of a customer in 360 view.		
14	Capability to create prospects with minimal information and also to convert prospects to customer.		
15	Providing unified view of Customer 360 in Mobile Client		
16	Capability to classify customer based on any customer data field present in Customer Database which shall be refreshed using the daily data feed to be fetched from CBS.		
17	Option to modify specific customer fields and attach documents in different formats (like pdf, docx, jpg, png etc) in Customer 360 View.		
18	Option to create any number of new custom fields in Customer 360 main screen and sub screen with provision to add custom validation logic by the administrators		
19	Maker/Checker functionality in Customer Screen for data capture of Customer Fields with option to enable/disable the functionality field wise.		
20	ML & AI capabilities to display the cross sell/up sell products in customer 360 page		
21	Plugin/Interface to integrate with Social Media Platforms(Facebook, Twitter, Instagram etc) from Customer 360 Module of a customer.		
22	Data quality check is in-built into the system and data governance is part of this module.		

D	User Management		
1	AD Authentication mechanism for CRM User Login using Bank's existing Active Directory/Azure active directory.		
2	Ability to create CRM user in different roles (Sales/Service User, Marketing User, Call Center User etc).		
3	Ability to tag the user to any team/groups/regional offices etc. Also a user shall be able to added in more than one team		
4	Ability to set the user visibility to each modules based on User's team or Role.		
5	Ability to restrict user permission to each modules(Read/Write)		
6	Ability to handle employee transfer and designation change in CRM based on HRMS Data Feed on a daily frequency.		
7	Ability to generate audit log of the activities done in a user login by Admin/Super User.		
E	Integration Capability		
1	Ability to integrate with Email gateway (SMTP service & Server level Email Authentication ) and SMS Gateway(through DB/API's interfaces)		
2	Ability to interface with third party applications via Web Services (REST/SOAP) and ISO communication, SQL queries(Oracle, SQLServer, MySQL DB)		
3	Ability to integrate with directory services standards like LDAP( Microsoft Active Directory)		
4	Availability of integration toolkit/SDK/Standard IDE as out of box for customization by Bank's Team without the need of separate customization.as part of CRM platform at no additional license or product cost.		
5	Whether Source code of customizations will be shared with Bank		
6	Whether Product Source code will be shared with Bank for code review and customization.		
7	Ability to create/modify GUI fields by Front End by admin user.		
8	Ability to modify and create GUI layout/dashboard/User Screen and adding validations/java scripting by the admin user.		



9	Capability to integrate with Partner's CRM for leads and complaint management of third party products.		
10	Ability to integrate with Social Media Platform( Facebook, WhatsApp, Twitter, Instagram) & Bank's Chatbot solution through native API's supported in the platforms and availability of OOB(Out of the Box) plugins for Integration.		
11	Capability to onboard Existing customers by fetching data from Customer 360 on lead conversions in upsell and cross sell.		
12	Capability to capture customer data in CRM through lead and share the same data into other applications via DB Call's and API's for respective asset and liability products to ensure smooth conversion.		
13	Solution shall integrate with IBM/Oracle/Leading ESB/API Connect solution for SMS, OTP Sending through Rest API's and DB calls.		
14	Ability to integrate with any channel through DB Call's and API's.		
15	Ability to process Inbound API's and outbound API's.		
16	Ability to configure the API integration( Inbound & Outbound API's) by the administrator through GUI		
17	Ability to share data with data ware house system/ODS.		
18	Ability to carry the integrations in STP mode and to perform Reconciliation, Error logging & generate reports		
19	The portal should have capabilities to included chat-bots, engagement engines, live-chats, video calls, & integration with document management system		
20	the CRM should have extensions to Microsoft Outlook, Microsoft teams etc		
<b>F</b>	<b>Mobility</b>		
1	Availability of Native Mobile App of CRM in Android & IOS Platforms.		
2	Availability of Customer 360, Sales and Service Module as Out of Box Modules in Mobile Client without any additional customizations		
3	Ability to publish the changes in real time to Mobile Client whenever any update/patch is deployed on the CRM Web Application		

4	Compatibility of Mobile Client with latest Android OS & IOS versions.		
5	Ability to add/modify GUI fields by admin user.		
6	GPS tracking & Geo-Tagging sales user of Mobile Client		
7	Ability to work offline, and then automatically synchronizes data bi-directionally once a connection has been re-established.		
8	Option to create tasks, Easily manage and enter account info., Add and organize contacts, Schedule meetings: Transmit meeting notes or details at the point of contact, Assign follow up activities, Track existing or new opportunities, Request approvals		
9	Ability to control the mobile device access of CRM and provides access and relevant data to authorized individuals only and with encryption, authentication, and authorization technologies and role based services		
<b>G</b>	<b>Reports/Analytical Component</b>		
1	Ability to generate On the Fly/Dynamic Reports from Application through GUI		
2	Ability to generate reports in Application via SSRS Services or using SQL Query from Backend		
3	Ability to export the reports to excel, pdf, docx formats		
4	Ability to drill down the Reports		
5	Ability to generate a summarized report from an existing report by normal users		
6	Ability to incorporate Graphical Representation in Reports.		
7	Capability of Reporting Application to generate analytical reports on trends and data patterns based on Customer Interactions & transactions & also using customer data in CRM		
8	Ability to fetch result set from other Application Databases and use it for generating reports by combining with the data available in CRM Databases. For example some reports might need to be generated by combining transactional data from CBS/Other Subsystems and CRM Data(		

	says Lead Details) for showing the Profitability aspect.		
9	Facility to create Reports from the Tool by Bank IT team using SQL Queries/any Scripting Language/GUI Based Platform or another Object Oriented Language.		
10	Ability to generate AI driven reports on Optimize customer and client interaction to integrate data analysis by Artificial Intelligence (AI) and Machine Learning (ML) capabilities.		
11	The system should have a capability to provide an integrated reporting tool for new reports to be created as required. The tool should enable the Business users to create dynamic reports.		
12	Capability to generate comprehensive reports for all modules and activities in CRM with drilldown options and graphical dashboards.		
13	Capability of the system to restrict report module access based on users' roles and authorization. Reports shall be dynamically changed based on user role/team.		
14	Capability to provide industry standard reports for Lead, Complaint Management & Customer Service Module.		
15	Capability to schedule auto- generation of reports in CRM and sending the reports in different formats like HTML, Docx, Excel, PDF formats as mail to crm users/specific email id's with configurable option to admin role users.		
16	Availability of Complaint Management Dashboards & reports for reporting to regulatory authorities like RBI, SLBC, MOF, NPCI etc.		
17	Capability to customize Report Layout for existing OOB reports in the solution and to create new Report Layout/Dashboard/Graphical Drill down Report layouts		
18	Capability to generate Custom Report Templates in CRM		
19	Capability to generate reports using larger data set & capacity to export the result of large records say( 5 lakh records)		
20	Capability to monitor the Report Generation, schedule the report and		

	providing email/SMS notification to admin users in case of any exception		
<b>H</b>	<b>Employee Management</b>		
1	Option to create task/activities and assign to employees by Supervisors/Team Heads/RO Users'/Sales Head role users		
2	Option to monitor the activities of an employee in team wise/user wise and availability of standard monitoring reports		
3	Provision to generate Performance evaluation report of an employee for Staff Incentive Scheme		
4	Provision to send notification(SMS & Email) automatically from application based on logic to be set in workflow to employee for any pending task/alert/lead monitoring etc		
5	Provision to assign Lead & Campaign Target to each teams/groups based on Organization hierarchy from RO/HO Level.		
6	Provision to track the performance of Team/Group/ RO from HO Level and ability to generate reports for monitoring		
<b>I</b>	<b>CRM Data Import</b>		
1	Availability of ETL Tool as out of box with the CRM solution at no additional cost or additional License cost		
2	Ability of Data Import mechanism to extract data from different Databases ( Oracle, SQL Server, MySQL etc) and Feed files( plain text, spreadsheet)		
3	Specify the Data Import mechanism with details on mechanism of data transfer(Web Services/SQL/MSMQ etc)		
4	Specify the Benchmark on no of records that can be inserted to CRM solution per hour		
5	Specify the standard Benchmark of the solution for Data loading		
6	Specify the models available to load daily incremental data load and real time data loading mechanism.		
7	Capability to schedule and configure data lading process in batch job mode/real time by admin users from GUI.		
8	Capability of loading complete customer data from CBS (Finacle 10) system to CRM Solution.		

9	Availability of Error Handling mechanism in Data Import Process during data import/scheduling process and ability to handle run time exception during Data Import.		
10	Option available as out of box feature to generate reconciliation report after the daily run of data import by comparing with records in the source tables/feed files.		
<b>J</b>	<b>Document Management</b>		
1	Ability to create a Central repository for sales, service and other banking teams		
2	Ability to create Email/SMS templates in Document Management for Lead Notification, Campaign Mailers.		
3	Capability of Integrating with the Banks DMS ( Document Management system ) through file upload		
4	Capability of creating a knowledge management system to be used for Sales & Service Agents in the solution using the data present in Data Repository		
5	Ability to create a content Repository for all Lead Management & Service Modules.		
6	Ability for Keyword based content tagging - search ability		
7	Ability to create Content groups - sales, service, marketing, strategy etc.		
8	Ability to create an Open and closed group access for the Document Repository.		
<b>K</b>	<b>Data Center</b>		
1	The core CRM system should have the data center in India (Mandatory for cloud solutions – solutions not complying with this criteria will not be considered for further evaluation)		
<b>L</b>	<b>Cloud Security (Mandatory for Cloud CRM Solutions)</b>		
1	The CRM Solution should offer various secured data migration methods to suit your business requirement. For eg: In the case of a bank, the data is residing within the firewall and is highly secured. To bring that to the CRM, it should data movement via RIDC ( Remote Intra Doc Client), EDLC (		

	External Data Loader Client), Orchestration layer and IPSec .		
2	CX platform, as per Data Processing Agreement should be entitled to the "Right to Audit". During the audit process, CX Application should share the following documents as per the regulation in India. 1) ISO certificates 2) BC and DR report 3)PCI HIPAA Security Assessment and sub processor list 4)SIG 5) SOC reports and bridge letters 6)Standard Security artifacts		
3	As per Indian regulation in Information Security parlance, all API endpoints exposed from the bank and consumed by the bank should be HTTPS and secured via 2-way SSL. The vendor should provide an orchestration layer to smoothly the integration of CRM Solution with upstream and downstream applications in a secured way		
4	CRM solution should offer encryption of data during transit and in rest.		
5	The CRM Solution should provide a Complete CDM framework that helps to bring data (contact and account) from various sources & clean it to create a golden customer record. The CDN should also support survivorship, data quality and data management rule engine.		
6	The solution provided should be on Meity accredited cloud		
7	DC and DR should be both in India (important as per RBI guidelines)		
8	There should be data encryption in transit and at rest (data security)		
9	There should be regulator right to examine the datacentre (important as per RBI guidelines)		
<b>M</b>	<b>CRM Application</b>		
1	The CRM system should help AI-powered, win probability calculations provide consistent, accurate scoring. Plus discrepancies between AI & Sales Rep win probability scores generate alerts.		
2	The CRM system should help recommend the next best documents to be used based on the stage of the opportunity and the service of the		

	same. The CRM system should have the capability to provide a platform to build AI/ML capabilities and to write custom build algorithms to basically fit EXIM's services and cross-sell/up-sell logic		
3	The CRM system should help provide an engagement tool to help rule based processing of business scenarios and business logics/policies.		
4	The CRM system should help Sales Reps review opportunities showing alerts to determine where to focus their time		
5	The system should help in account scoring. These scoring criteria's should be customizable by the sales management. Scoring criteria should be visible to reps to build credibility of scoring systems and improve quality through rep feedback. The CRM system should provide a data-driven framework for identifying the best opportunities		
6	The CRM system should be capable to help sale team calculate Incentive calculation and help manage complete sales performance		
7	The system should help in providing credit management and compliance system for better sales management .		
8	The CRM system should be capable to help sale team calculate Incentive calculation and help manage complete sales performance		

**PRE-BID QUERY FORMAT**

**Bidder's request for Clarification - to be submitted minimum of two days before pre-bid meeting.**

If, bidder, desiring to respond to RFP for "Closed Request for Proposal (RFP) for Customer Relationship Management Solution for Export Import Bank of India", require any clarifications on the points mentioned in the RFP may communicate with EXIM Bank using the following format.

All questions received at least three days before the pre-bid meeting (pre-bid meeting will be held online. Online Meeting details will be shared with interested bidders whose pre-bid queries received dates mentioned in e-tender) 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, Export-Import Bank of India may at its discretion, answer all such queries in the Pre-bid meeting.

Bidder's Request for clarification		
To be emailed to:	<a href="mailto:kiran@eximbankindia.in">kiran@eximbankindia.in</a> / <a href="mailto:maresh.b@eximbankindia.in">maresh.b@eximbankindia.in</a>	
Name of Organisation submitting request	Name & position of person submitting request	Contact Details
		Email:
		Tel/Mobile:
Page Number	Point Number	Query description

Name and signature of authorised person issuing this

1. In case of multiple queries, the contact details need not be repeated and only last two rows of the above format (table) are to be furnished for the subsequent queries.
2. Please use email or softcopy.