



SBI CAPITAL MARKETS LTD

RFP for the Support of CRM system



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1 Introduction

SBI Capital Markets Ltd. is hereinafter called "SBICAP", in this Requirement Document.

A vendor submitting the proposal in response to this Requirement Document shall hereinafter be referred to as "Vendor".

This Requirement Document is issued by SBICAP for inviting proposals (Technical and Commercial Bids) from competent vendors for the onsite support for CRM system, terms and conditions and scope defined in this document.

Date of Issue of RFP: 03 Jan 2018

Last Date for Receipt of Bids: 08-Jan-2018

Address for submission of proposal

Group Head (IT)

SBI Capital Markets Ltd

202, Maker Tower E,

Cuffe Parade, Mumbai 400 005

Contact Person: Sharad Jambukar – 2217 8567 / 9920730519

2 Time Lines

The following is an indicative timeframe for the overall selection process. SBICAP reserves the right to vary this timeframe at its absolute and sole discretion and without providing any notice/intimation or reasons thereof. Changes to the time frame will be relayed to the affected Respondents during the process.

	Particulars	Due Date
1	RFP Publishing	03 Jan 2018
2	Last Date of Queries from Respondents	05 Jan 2018

3	Date Of Submission of Technical & Commercial Proposal	08 Jan 2018

The time schedule will be strictly followed. Interested parties are expected to adhere to these timelines. However, SBICAP reserves the right to change the aforementioned timelines. No clarification will be entertained post the time lines specified in the table above (Last date of queries). All dates and timing specified above are non-negotiable and there will be no extensions provided.

3 Scope of Work & Deliverables

- The Respondents are required to supply onsite resource to support CRM system as per the scope mentioned in AMS document

4 Respondents Eligibility Criteria

- The Respondent must have a registered office in India and main business must be Software Services.
- The Respondent should be a well-established player in the field of Application Development and System Integration and support in Asp.Net platform at least for the last five years.
- The Respondent must have been supporting application management activities within financial services company with direct SLA responsibility and providing L1,L2,L3 support on all technologies including ASP. Net, Java, Oracle and MS SQL platform etc and must have at least five such AMS contracts ongoing.
- Annual turnover of the respondent should not be less than Rs. 10 Crore.
- The Respondent should have deployed at least 10 Applications in Bespoke category for reputed companies or have carried out at least 5 implementation such as CRM, Web based applications.

- The respondent must have been certified with standards such as ISO 27001 or CMMI Level 3 Standards
- Any Bids of which are non-compliant with above eligibility criteria will not be considered for both Technical and commercial evaluation.

5 Submission of the bid

- The Respondents are allowed to submit only one bid.
- The Respondent has to keep the Technical and Commercial Bid in two separate sealed envelopes marked as '**Technical Bid for the Support and Maintenance of CRM**' and '**Commercial Bid for Support and Maintenance of CRM**'.
- The Bid documents should be in prescribed format as given in Annexures. Proposals not in the format given in Annexure will be rejected.
- The Respondent should submit the original documents in physical format and no softcopies are acceptable for both technical and commercial proposal.
- The bids should be addressed to "**Group Head (IT), SBI Capital Markets Ltd., 202, Maker Towers "E", Cuffe Parade, Mumbai 400 005** .
- The 'Technical Bid' will contain the exhaustive and comprehensive solution details, whereas the 'Commercial Bid' will contain the pricing information. The Technical Bid should NOT contain any pricing or commercial information at all.
- No part bidding is allowed, the solution proposed should be complete in all respect.
- The Technical bid should contain list of all items to be delivered including the Solution details with technical specifications etc. The detailed specification of each item needs to be included in the technical proposal. Insufficient information may lead to the rejection of technical proposal.
- The commercial proposal should contain only the pricing information.
- The quotation submitted by the Respondent shall be inclusive of all taxes, as applicable, at the date of submission of the proposal.

- Break up showing different components of taxes should be submitted.
- All bids should be in INR and should be valid for a period of six months from the date of submission of the bid.
- Prices payable to the Respondent as stated in the Contract shall be firm and not subject to adjustment during performance of the Contract, irrespective of reasons whatsoever, Including exchange rate fluctuations, changes in taxes, duties, levies, charges, etc.

7 Clarification Related To Requirement Document

- Any clarification regarding the RFP document and any other item related to this project can be raised via e-mail. No clarification will be entertained after timelines provided in the calendar.
- For all clarification, please contact:
 - Sharad Jambukar – sharad.jambukar@sbicaps.com
 - Sagar Vichare- Sagar.vichare@sbicaps.com
- SBICAP will evaluate only those proposals, which meet the eligibility criteria as well as complete and responsive in all respects, for comparison and final selection.
- The objective of the evaluation process is to evaluate the bids to select the Respondent with the best value proposition to SBICAP.
- SBICAP shall evaluate the Technical Bids initially and based on Technical Bid evaluation, shall undertake Commercial Bid evaluation of the technically qualified proposals only.

Technical Bid Evaluation Process

The proposal submitted by the Respondents shall be evaluated on technical grounds covering various components as per annexures.

Data for the above information will be based on the information submitted in Technical Proposal, Reference Sites, Information available in public domain and past experience of evaluation team.

By satisfying all technical parameters doesn't guarantee technical qualification, SBICAP will qualify only technically superior proposal based on evaluation.

Refer Annexures for details.

Disqualification Parameters in Technical Bid Evaluation

- SBICAP will qualify only those proposals which are superior in technical evaluation and the number of proposals qualified will be based on the discretion of technical evaluation committee.
- SBICAP at its discretion may reject the proposal of the Respondent without giving any reason whatsoever.
- The Commercial Proposal of the Respondent should be as per the format The Bids which are "Technically Qualified" will only be considered for Commercial Bid evaluation.
- Technical Bids comprises of:-

Format Number	Name of the Format
AS per Annexure Format	Technical Proposal Covering Letter
AS per Annexure Format	Commercial Proposal Covering Letter
AS per Annexure Format	Confirmation of Terms and Conditions, Scope of work and SLA
AS per Annexure Format	Minimum Eligibility Criteria covering letter
As per Annexure format	Client references
Technical Proposal	
Capability	<ul style="list-style-type: none"> - Manpower with similar experience - Bidders experience in similar field - Any other information on - capability or competitive advantage

Commercial Bid Evaluation

- SBICAP will only open those commercial bids whose technical bids superior in Technical evaluation.
- SBICAP reserves the right to further negotiate the contract price/terms with the selected vendor.

- Refer All Annexures for format

9 Selection Criteria:

SBICAP will select lowest commercial bidder subjected to technical bid acceptance of individual vendor.

10 Payment Terms

- Monthly in arrears.
- Penalties, if any, on account of delayed implantation and non-compliance of SLA, shall be deducted from the invoice value.

11 Cancellation of the order

SBICAP reserves its right to cancel the order in the event of one or more of the following situations that are not occasioned due to reasons solely and directly attributable to SBICAP alone:

- SBICAP has the right to cancel the order in case of an unsatisfactory support.
- Serious discrepancy in the quality of service/ software expected during the and maintenance process.
- 60 days ether side notice is must.

12 Confidentiality and Non-disclosure

- The Respondent agrees to receive in confidence all Confidential Information and agrees not to reveal the same to any other person under any circumstances, except to the extent provided for in this Agreement. The Recipient shall also ensure that the Confidential Information is not used for any of its business or other purposes or such purposes of any other person.
- The Respondent shall also procure from their respective employees, officers and agents to whom Confidential Information is revealed, a similar obligation of Confidentiality in the form of a Non-Disclosure Agreement, which is

reasonably acceptable to SBICAP. A breach by the respective employees of the Recipient of the terms of the Non-Disclosure Agreement shall be considered as a breach by such party of its obligations to the Disclosure.

- All disputes and controversies between SBICAP and Respondent shall be subject to the exclusive jurisdiction of the Courts in Mumbai and the parties agree to submit themselves to the jurisdiction of such court. This Project agreement shall be governed by the laws of India.
- Selected bidder is shall sign the NDA.

13 General Terms & Conditions

- All responses by the Respondents to this Requirement Document shall be binding on such Respondents for a period of 365 days from the date of opening the commercial Bid.
- Any technical or commercial bid submitted cannot be withdrawn/modified after the closing date and time for submission of the bid offers unless specifically permitted by SBICAP. However, the Respondent may modify or withdraw its offer after submission provided that, SBICAP, prior to the closing date and time receives a written notice of modification or withdrawal.
- SBICAP reserves the right to reject any or all bids in full without assigning any reason whatsoever.
- The Respondent has to adhere to the time schedule of activities mentioned in the Requirement Document and no request to change the last date or extend period/time for submission shall be entertained by SBICAP. However, SBICAP reserves its right to extend the date/time for submission of the responses without assigning any reason by notifying all the short listed Respondents.
- Any additional or different terms and conditions proposed by the Respondent will be rejected unless expressly assented to, in writing by SBICAP.
- SBICAP may modify the Requirement Document by issuing addenda for any reason at any time prior to the final date of submission of Requirement Document response and will be communicated to all the Respondents.
- SBICAP reserves the right to alter the requirements specified in the Requirement Document for any reasons prior to the last date of submission of Requirement Document. SBICAP also reserves the right to delete one or more items from the list of items specified.
- All taxes are subject to deduction of all statutory deductions applicable, if any.

- The Respondent has to include all costs like Travel, Lodging & Boarding, Local Travel expenses, etc. incurred during the project life cycle as a part of the Bill of Materials in commercial proposal and SBICAP will not bear any additional costs on these.
- SBICAP reserves the right to accept or reject any and all proposals, to revise the Requirement Document, to request one or more re-submissions or clarifications from one or more Respondents, or to cancel the process in part or whole. No Respondent is obligated to respond to or to continue to respond to the Requirement Document. Additionally, SBICAP reserves the right to alter the specifications, in part or whole, during the RFP process, and without re-issuing the Requirement Document.
- SBICAP may revise any part of the Requirement Document, by providing a written addendum to all the short-listed Respondents till the award of the contract. SBICAP reserves the right to issue revisions to this Requirement Document at any time before the award date.
- The Requirement Document and all supporting documentation/templates are the sole property of SBICAP and shall **NOT** be redistributed without the prior written consent of SBICAP. Violation of this will be a breach of trust and may, *inter-alia*, cause the Respondent to be irrevocably disqualified.
- No subcontracting will be allowed.
- The Requirement Document contains statements derived from information that is believed to be true and reliable at the date obtained but does not purport to provide all of the information that may be necessary or desirable to enable an intending contracting party to determine whether or not to enter into a contract or arrangement with SBICAP in relation to the provision of services. Neither SBICAP nor any of its directors, officers, employees, agents, representative, contractors gives any representation or warranty (whether oral or written), express or implied as to the accuracy, updating or completeness of any writings, information or statement given or made in this Requirement Document. Neither SBICAPs nor any of its directors, officers, employees, agents, representative, and contractors has carried out or will carry out an independent audit or verification or investigation or due diligence exercise in relation to the contents of any part of the Requirement Document.

- All costs and expenses (whether in terms of time or money) incurred by the Recipient/ Respondent in any way associated with the development, preparation and submission of responses, including but not limited to attendance at meetings, discussions, demonstrations, etc. and providing any additional information required by SBICAP, needs to be borne entirely and exclusively by the Recipient / Respondent.
- The bidder is required provide telephonic/remote assistance for any technical glitches for a period of one year from the date of sign-off.