Request for Proposal
for
Selection of Vendor -
Lead Management System
for Marketing Officers

Reference No.: **CO/MKTG/2022-23/35** **Dt. 22.08.2022**

Issued by: **Central Bank Of India, Marketing Dept, 16th Floor, Chander Mukhi, Nariman Point, Mumbai – 400021.**

Ph: 022- 66387834 / 66387871

Email: **agmmarketing@centralbank.co.in**

Website: **www.centralbankofindia.co.in**

1.0. INTRODUCTION

1.1 Invitation for RFP offers

Central Bank of India invites sealed RFP offers (Eligibility, Technical bid and Commercial bid) from eligible, reputed entities for **Selection of vendor - Lead Management System for Marketing Officers** In this RFP, the term bidder/ prospective bidder refers to the primary bidder participating for delivering services mentioned in the scope of works.

Complete set of RFP documents may be downloaded by the bidders from the website of the Bank. The cost of RFP document should be paid in the form of Demand Draft **for *[INR 5000/-]*** favoring Central Bank of India payable at Mumbai along with the BID responses.The Bank reserves the right to reject any or all offers without assigning any reason.

Technical Specifications, Terms and Conditions and various formats for submitting the RFP offer are described in this document, Annexures.

1.2 ABOUT THE BANK

Central Bank of India is one of the largest PSU Banks in India with a network of more than 4500+ branches and 2900+ ATMs spread across India. The Bank offers wide range of products and services to both Corporate and Retails Customers. Bank also provides services to its customers through alternate channels such as Internet Banking, Debit Cards, Mobile Banking, etc. To expand further reach, Bank is also forging ahead with cutting edge technologies and innovative new banking models.

1.3 INFORMATION PROVIDED

This document contains statements derived from information believed to be reliable at the date obtained but does not purport to provide all 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 the Bank in relation to the **Selection of Vendor - Lead Management System for Marketing Officers.** Neither the Bank nor any of its employees, agents, contractors, or advisers give any representation or warranty, express or implied, as to the accuracy or completeness of any information or statement given or made in this document.

1.4 FOR RESPONDENTS ONLY

The document is intended solely for the information of the party to whom it is issued ("the Recipient" or "the Respondent").

1.5 CONFIDENTIALITY

The Invitation document is confidential and is not to be disclosed, reproduced, transmitted, or made available by the Recipient to any other person. The Invitation document is provided to the Recipient on the basis of an undertaking of confidentiality given by the Recipient to the Bank. It is to be noted that bank may update or revise the document before bid due date and must allow a reasonable time to submit the revised bids by the bidders in accordance with the revised RFP document. The Recipient acknowledges that any such revised or amended document shall be received subject to the same confidentiality undertaking. The Recipient will not disclose or discuss the contents of the document with any officer, employee, consultant, director, agent, or other person associated or affiliated in anyway with Bank or any of its customers or suppliers without the prior written consent of Bank.

1.6 RFP DISCLAIMER

This Request for Proposal containing Annexures has been prepared solely for the purpose of enabling the Bank to select a Service Provider for **Selection of Vendor - Lead Management System for Marketing Officers** as per specifications, terms and conditions and scope defined in this RFP.

The bidder will be required to be innovative, capable and would need to extend all their resources and services in order to meet the expectation of the Bank towards providing the required services.
This RFP document is not a recommendation, offer or invitation to enter into a contract, agreement orother arrangement in respect of the supply and services as per the scope of this RFP.

1.7 Important Details (Schedule of Events, contact & communication details etc.)

1.	RFP No.	RFP NO: CO/MKTG/2022-23/35
2.	Brief Description of the RFP	Selection of Vendor - Lead Management System for Marketing Officers
3.	Bank's Address for Communication and submission of RFP	Central Bank of India, Marketing Department, 16th Floor, Chandermukhi, Behind Trident Hotel, Nariman Point, Mumbai, Maharashtra 400021
4.	Date of Commencement of Bidding Process	22/08/2022
5.	Last date of submission of Queries for Pre-Bid Meeting	29/08/2022
6.	Date & Venue of Pre-Bid Meeting	Date: 02/09/2022 (15:00 HRS) Venue: Central Bank of India, Marketing Department, 16th Floor, Chandermukhi, Behind Trident Hotel, Nariman Point, Mumbai, Maharashtra 400021
7.	Last date & time for submission of Bids	12/09/2022, 3.00 PM
8.	Date and time of Opening of Eligibility and Technical Bid	12/09/2022, 3.30 PM
9.	Date and time of Opening of Commercial Bid	The commercial bids of only those vendors who qualify in both eligibility and technical evaluations will be opened. The date for opening of the commercial bid would be communicated separately to the technically eligible vendors.
10.	Bid document cost (non-refundable)	Rs. 5000/-
11.	Bid Security (EMD)	Rs. 200,000/-
12.	Contact Person for any clarification	agmmarketing@centralbank.co.in

The above dates are tentative and subject to change without any prior notice or intimation. Bidders should check website www.centralbankofindia.co.in for any changes / addendums to the above dates and/or any other changes to this RFP. Bidders to confirm with Bank the time & venue -1- day prior to any of the above scheduled event.

Eligibility cum Technical bids will be opened, in the presence of the bidder's representatives who choose to attend the opening of technical bid. No separate communication shall be sent in this regard. Subsequently, the Bank will evaluate the Technical Bids and the bidders shall be suitably intimated about their technical bid after evaluation.

Commercial bids will be opened in the presence of the of the bidder's representatives who are found technically qualified by the Bank upon evaluation and choose to attend.

The services of selected vendor can automatically be availed by Central Bank of India, basis terms and conditions of the requirement and in line with the cost identified for the said RFP.

1.8 COSTS TO BE BORNE BY BIDDERS

All costs and expenses incurred by Bidders in any way associated with the development, preparation, and submission of their responses to the RFP, including but not limited to attendance at meetings, discussions, presentations, demonstrations, etc. and providing any additional information required by the Bank, willbe borne entirely and exclusively by the Bidder and the Bank shall not be liable for any costs and/or expenses in relation to responses to the RFP and/or shall not entertain any requests / representations regarding bearing/sharing of costs and /or expenses.

1.9 LEGAL RELATIONSHIP

No binding legal relationship will exist between any of the Bidders and the Bank until execution of a definitive legal agreement.

1.10 DISQUALIFICATION

Any form of canvassing/lobbying/influence/cartelization, etc. by the Bidder may result in disqualification of such Bidder

1.11 INFORMATION CONFIDENTIALITY

The information contained in this RFP is strictly confidential. The Bidder shall not share this informationwith any other person/party not connected with responding to the RFP or even with other potential Bidders. The information contained in the RFP or subsequently provided to Bidder(s), whether verbally or inwriting by or on behalf of Bank shall be subject to the terms and conditions set out in the RFP and any other terms and conditions subject to which such information is provided.

1.12 EVALUATIONS OF OFFERS

Each Recipient acknowledges and accepts that the Bank may, in its sole and absolute discretion, apply whatever criteria it deems appropriate in the selection of organizations, not limited to those selection criteria set out in this document. The issuance of document is merely an invitation to offer and must not be construed as any agreement or work order or arrangement, nor would it be construed as material for any investigation or review to be carried out by a Recipient. The Recipient unconditionally acknowledges by submitting its response to this document that it has not relied on any idea, information, statement, representation, or warranty given in this document.

1.13ERRORS AND OMISSIONS

Each Recipient should notify the Bank of any error, omission, or discrepancy found in this document.Notification should be made to the address found in proposal related details

1.14 ACCEPTANCE OF TERMS

The purpose of the RFP is to provide necessary information to the potential Bidders, who qualify and intend to submit their response to the RFP. Though the RFP has been prepared with sufficient care and diligence with an endeavor to provide all required information to the potential Bidders, Bank acknowledges the fact that the potential Bidders may require more information than what has been provided in the RFP. Accordingly, in such cases, the potential Bidder(s) may seek additional information/clarification required from Bank. Bank reserves the right to provide such additional information/ clarification at its sole discretion. In order to respond to the RFP, if required, and with the prior permission of Bank, each Bidder may conduct their own study and analysis, as may be necessary, at their own cost and expense ensuring they adhere to the timelines mentioned in the RFP. No additional time will be provided to Bidders to undertake any analysis or study.
Bank makes no representation or warranty and shall incur no liability, whatsoever, under any law, statute, rules or regulations on any claim the potential Bidder may make in case of failure to understand the requirement and respond to the RFP.

Bank may, in its absolute discretion, but without being under any obligation to do so, update, amend or supplement the information given in the RFP and specify additional user requirements or cancel the RFP at any time without assigning any reason thereof and without any notice.

While due care has been taken in the preparation of this document, Bank will not be held responsible for any inaccuracy in the information provided herein. The recipient of the RFP must apply its judgment, care and conduct its own investigation and analysis regarding any information contained in the RFP document including but not limited to the scope of work, Deliverables and timelines, etc.

It is the Bidder's responsibility to:

- Properly understand and examine the RFP;
- examine all other information available on reasonable inquiry relevant to the risks, contingencies andcircumstances affecting its response;
- satisfy itself as to the completeness, correctness and sufficiency of its response;

A recipient will, by responding to the Bank's RFP document, be deemed to have fully read, understood and accepted all the terms as stated in this RFP document.

1.15 LIABILITIES OF THE BANK

This Invitation is not an offer by the Bank, but an invitation for Bidder responses. No contractual obligation on behalf of the Bank whatsoever shall arise from the invitation process unless and until a formal Service Level Agreement is signed and executed by duly authorized officials of the Bank and the selected bidder.

Willful misrepresentation of any fact within the Bid will lead to the cancellation of the definitive agreement,without prejudice to the other actions that the Bank may take. All the submissions, including any accompanying documents, will become the property of Central Bank of India.

2.0. REQUIREMENTS SUMMARY

2.1 INTENT

The Bank is issuing this RFP document (hereinafter referred to as "the RFP" which expression shall include all attachments and annexures hereto as well as all amendments, addendums, modifications and alteration hereto) to service providers, (hereinafter referred to as "the Bidder") to enable them to participate in the competitive bidding for **Selection of Vendor - Lead Management System for Marketing Officers.**

The bidder will be required to be innovative, capable and would need to extend all their resources and services in order to meet the expectation of the Bank towards the desired Services.

The Bank at its discretion reserves the right to change the scope of the RFP considering the size and variety of the requirements and the changing business conditions.

2.2 PERIOD OF SELECTION

Bank proposes to empanel a vendor for Lead Management System for Marketing Officers for a period of **3 years**. The initial empanelment shall be for a period of 1 year. Which shall be renewed periodically for a maximum period of 2 years with a review after end of each year. Total 1+1+1 i.e. for 3 years.

2.3 APPLICATIONS

The scope of works in the Request for Proposal (RFP) for the **Selection of Vendor - Lead Management System for Marketing Officers** would include but not be limited to providing service/solution for **Selection of vendor - Lead Management System for Marketing Officers** and its maintenance and support for the tenure of the Contract.

2.4 LANGUAGE

The Selection of vendor implementation & support for Lead Management System should be in English. However, it should have the capability to support certain communication templates in Hindi language. This capability shall be a part of standard offering of the Selection of vendor implementation & support for Lead Management System including report printing by the Bank users. The data in the database will be stored in English language.

2.5 DATA INTEGRATION

- The selected vendor will be responsible for successful data integration with existing customer data available with the Bank.
- The selected vendor will be responsible for developing integration scripts, upload scripts, testing, and rectification with the electronic data available in the Bank's system.

2.6 TRAINING

The Vendor is required to provide training to the Bank's Technology teams on the proposed **Lead Management System for Marketing Officers,** provide a training schedule and furnish training details as per the RFP requirements at all major locations.

2.7 MANUALS/DOCUMENTATION

Vendor should provide the "Help-Manual" of the application.

3.0 SCOPE OF WORK

The Leads received from various sources should get automatically updated in the Lead Management System. The Lead Management System will analyze the leads and will assign it to the respective Regions of the Bank where the leads will be handled by the Marketing Officer. After doing the follow-ups with the clients, the positive leads will be then assigned to respective Branches to do further follow-ups/actions.

Central Bank of India invites reputed firms for the submission of bids for the implementation of Lead Management System. The scope of work includes, but not limited to the following:

3.1 USER MANAGEMENT

User management functionality is used to create user, provide user login and password and to give authorizations to the users. To be able to work in the system, users must have authorizations or permissions based on the role they have been assigned.

3.2 LEAD MANAGEMENT

Should be a complete lead repository consisting of customer Information, lead information and contact records. It should help to track the communications with the team and the customer and thereby keeping complete track record of every activity carried under a lead, approve genuine leads and assign follow-up tasks to the sales team.

3.3 TARGET MANAGEMENT

Target management enables to generate peak performance and make the team more productive. Yearly, monthly and daily targets should be defined for the team, based on amount, product, quantity and location wise, along with its graphical variation reports for comparison.

3.4 BRANCH LOGIN

The Leads uploaded or added from the HO will be assigned automatically by the system based on Region. These Leads will be visible to the branches in their login and can do the further follow up and activities/actions.

3.5 VARIOUS REPORTS

Reports based on all activities and transactions on the system. Each report should be facilitated with provision for filtration with different criteria, to ease the search and find task. The report section should have “export to excel/csv format” feature.

3.6 APPLICATION NOTIFICATIONS & ALERTS:

The alerts and notifications from the system should be effectively intimated to the users. (Marketing officers) in Mobile & desktop app.

3.7 MONITORING DASHBOARDS

Should have user friendly dash boards for all users with “quick view” option that summaries the activities carried on. The powerful dash board can provide organized data in graphical representations based on different parameters. Each role/user should have dashboards with a summary of activity they are doing/assigned.

Category	**Scope**
User Management	Module Based Dashboards Add/Edit/Delete User **(provision for a total of 150 users at any time)** User Role & Permissions User Search User Activity Tracking Attendance Punch-in/Punch-out Location Tracking Notifications & Messages
Lead Management	Module based dashboard Lead Add/Bulk import Track Lead Stages Lead Activity Tracking Lead Assign to User/Zone/ Regions /Branches/ On Pan India Basis
Customer 360	Full details view of the customer with relevant information like address and contact number. Show history of all activities. List all the scheduled activities
Document Management	Provision to upload documents related to the leads to be provided in LMS.
Lead source	Lead source master management Filter the leads according to the source
Brochure Management	Product brochures and other product related documents for sharing
Target Management	Module based dashboard Target Assignment User /Region wise (Metro / Urban / Semi -Urban/Rural) Target Achievement Status/Reports Petrol Reimbursement Cash incentive.
EMI calculator	EMI calculation in accordance with the given inputs Option to Manually feed parameters such as ROI, Tenure, Loan Amount to be provided.
Campaign	Provision to add a new campaign and to monitor the progress and contribution of individual Marketing Officer/ Regional Offices in any campaign launched by the bank.
Sales	Sales marking against leads (Provision to mark the converted leads) Sales list (Provision to generate a list of converted leads) Sales filter
Expense	Provision to Add expenses incurred by the Marketing Officers. (Default option of 25 ltr Fuel cost reimbursement on declaration basis to be given) Provision to Admin Switch On and off the Fuel reimbursement option of Marketing officers. Expense approval/rejection Detailed Report

Attendance	Attendance list Attendance summary
Message	Option for the Admin to send SMS to the users.
Branch Login	Branch User login. **(Provision for 750 users)** Branch shouldn't be given the provision to add or delete any lead.
Reports	Custom reports Search & Filter facility Export to excel
Notifications & Alerts	On Mobile App and Web
Monitoring Dashboards	Module based informative dashboard Option for fetching Amalgamated data. (For individual Marketing Officer / Region / Zone)
Geo Location	Morning Attendance marking with geo coordinates. Meeting Punch in with geo coordinates Provision of Location tracking to be provided.

3.8 TECHNICAL REQUIREMENTS SCOPE

- Solution should be able to scale to accommodate future usage loads, such as load balancing, clustering, support for additional CPU cores etc.
- Solution should meet performance standards regardless of the location, Pan India
- System architecture to be scalable.
- Capacity to carryout high volume transactions.
- Capability to handle sub second response time
- Ability to scale linearly with respect to new hardware requirements
- Ability to work with different latest version of browsers.
- Capability to configure the existing modules, add new modules and have enough flexibility to accommodate changes in schemes and policy Add Data elements or extend data structure /data elements
- Capability to support multiple integration patterns and ease of integration with supporting systems (REST/ SOAP Web services)
- Supports online integration through various formats/ various internet protocols such as SOP, TCP/IP etc.
- The solution should provide Dev, Test and Prod environment to enable new requirements can be developed, tested and deployed with minimal disruption to business
- The solution proposed must be browser & handset agnostic (iOS and Android.)
- Mobile application should be optimized for any screen size of the mobile device and tablet.
- The proposed system must be capable of and compatible for Disaster Recovery & Business Continuity plan Implementation as and when required by client.
- The selected vendor should be capable of providing cloud based LMS including, but not limited to providing, third party utilities, testing, providing interfaces required for the Solution.
- System should follow all the necessary security and regulatory norms enforced from time to time by RBI or any regulatory body.
- The selected partner application should be available on either on cloud or on-prim. It should be compatible to migrate from cloud to on-prim and vis-a-vis. The data migration in such cases should be seamless.

3.9 INTERFACES & INTEGRATION:

- Vendor has to customize, implement, train, roll-out and maintain the interfaces.
- Bank expects that the integration/interface architecture is based around industry best practices.
- The interface architecture should be clearly defined. The integration architecture should include the types of interfaces supported; the standards used and should comply with Bank architecture principles
- Vendor will be responsible for developing, testing and maintaining the interfaces. When developing the interfaces, the vendor should ensure the requirements of data format, frequency of data transfer, quality checks and validations before data transfer and priorities for data transfer are identified and addressed.
- Vendor must ensure that all applicable interfaces are automated with no manual intervention required for their successful operation on an on-going basis.
- Vendor will be responsible for setting up the test environment for interface testing.
- The Solution must enable all currently specified interfaces as well as allow for introduction of new interfaces/channels as the case may be.
- Integration of LMS tool with Card Origination System to know status of the lead.
- The system should be compatible to integrate with any other Central Bank of India system either through API or any other such integration method.
- The solution should be able to integrate with Central Bank of India and Partner of Central Bank of India for SMS service and Email Service.
- The system should be able to transfer logs, documents uploaded to Central Bank of India if required.
- The system should have the provision for the Bank Branch Staff and Regional/Zonal Marketing Officer to submit the lead.
- The system should have the provision to capture reference number generated by Central Bank of India
- Multipoint integration should be available i.e. integration with Central Bank of India internal system at various stages within the given flow.
- The selected vendor will be responsible for identifying the detailed interface requirements for integrating the proposed packages to the proposed solution. The selected vendor will be responsible for developing, testing and maintaining the interfaces during the contract period.
- The Vendor is required to provide training to the Bank's Operations and Management teams on the proposed solution, provide a training schedule and furnish training details as per the RFP requirements.

3.10 SYSTEM LICENSES

1. The Bank will not be responsible or liable for any infringements or unauthorized use of the licensed products. In the event of any claims against the Bank for any license related issues, the selected Bidder willhave to act upon the same and all liabilities and claims whatsoever will have to be settled by the selected Bidder.

2. Selected Bidder is required to consider the Technical Support of the Solution and related application System for the period of contract from day one.

3. Further if the selected Bidder has missed out providing any required licenses to the Bank, then the Bank will not bear any additional amount for procurement of such licenses at a later date.

3.11 PROJECT OBJECTIVE

The entire scope of work/proposed requirement/services or obligations required to be performed by the Vendor in terms of this RFP shall be hereinafter be referred to as **"Project"/" Solution"/" Services"** and such terms may be used interchangeably, however shall have the same meaning as ascribed herein.

The Vendor should ensure that all systemic changes or new requirements necessitated out of Government / other regulatory guidelines or other Bank requirements as per the RFP are made available from day one of the **Lead Management System for Marketing Officers** going live. Any new government/ regulatory requirements that impact the provided **Lead Management System for Marketing Officers** to the Bank need to be incorporated as a feature upgrade or an enhancement or a patch and should be provided to the Bank at no additional cost during the period of the contract.

3.12 PROJECT SCOPE

Description of the envisaged scope is enumerated as under. However, the Bank at its discretion reserves the right to change the scope of the RFP considering the size and variety of the requirements and the changing business conditions.

1. Based on the contents of the RFP, the selected vendor shall be required to independently arrive at a **Lead Management System for Marketing Officers** which is suitable for the Bank, after taking into consideration the efforts estimated for implementation of the same and the resource and the equipment requirements. The Bank expressly stipulates the Vendor's selection under this RFP is on the express understanding that this RFP contains only the principal provisions for the entire assignment and that delivery of the deliverables and the services in connection therewith are only a part of the assignment. The vendor shall be required to undertake such tasks, render requisite services and make available such resources as may be required for the successful completion of the entire project at no additional cost to the Bank.
2. Considering the extensive nature of the assignment and the envisaged relationship with the Bidder, any service, which forms a part of facilities management that is not explicitly mentioned in this RFP as excluded would form part of this RFP, and the Bidder is expected to provide the same at no additional costs to the Bank. The Bidder has to envisage all necessary services to be provided and ensure thesame is delivered to the Bank. The Bank will not accept any plea of the Bidder at a later date for omission of critical services on the pretext that the same was not explicitly mentioned in the RFP.
3. The Bidder will be required to fix any vulnerability in this **Lead Management System for Marketing Officers** at no additional cost during the entire tenure of the contract. These vulnerabilities can be detected by the Bank or can be a finding of any internal or external audit conducted by the Bank or its auditors on a periodic basis.
4. The Bidder is required to note the following points:

    - The Bidder has to size the **Lead Management System for Marketing Officers** covering hardware, System & services to ensure availability, scalability, redundancy and performance of **Lead Management System for Marketing Officers**, and to meet technical and functional requirements as per the terms of the RFP within the timeframe prescribed by the Bank.

    - The Bidder is completely responsible for the proposed **Lead Management System for Marketing Officers** to meet the scope and objectives of the RFP issued thereafter. The Bank assumes no responsibility forassumptions made by the Bidder. In the event the proposed **Lead Management System for Marketing Officers** fails to meet the Service LevelAgreement (SLA) (if applicable and stipulated in this RFP) and the scope and objectives of the RFP (and addendums), the Bidder will have to upgrade, modify or replace the **Lead Management System for Marketing Officers** at no additional cost to the Bank.

- The Bidder has to ensure the arithmetical accuracy of the technical and commercial bid. The Bank will not be responsible for any errors in the bid submitted by the Bidder.
- Any assumptions, changes, deviations other than what is specified and accepted by the Bank will not be considered for the purpose of this RFP.

3.13 INTERFACE & INTEGRATION REQUIREMENTS

Please refer clause 3.0 Scope of Work

3.14 LICENSES

- The Bank will not be responsible or liable for any infringements or unauthorized use of the licensed products by the Bidder in performance of any activity/obligations undertaken by theBidder in terms of this RFP. In the event of any claims against the Bank for any license related issues, the selected Bidder will have to act upon the same and all liabilities and claims whatsoever will have to be settled by the selected Bidder.
- Further if the selected Bidder has missed out providing any required licenses to the Bank, then the Bank will not bear any additional amount for procurement of such licenses at a later date.

3.15 IMPLEMENTATION METHODOLOGY

- The selected Bidder should follow a suitable methodology for delivering the requirements of the RFP for the entire contract period. Accordingly, the Bidder should factor for necessary effort and team deployment. The methodology should clearly lay out the overall steps from initiation to closure of this engagement.
- The FRSM (Functional Requirements Specification Manual) would be reviewed by the Bank and the selected bidder is expected to remediate all gaps identified by the Bank.

3.16 FUNCTIONAL REQUIREMENTS SPECIFICATIONS STUDY (FRSM)

- The selected bidder will conduct a detailed systems requirements study and provide a solution specific FRSM for solutions relating to the functionalities as required supporting the various processes within the Bank as responded by the Bidder in **Appendix 01.**
- The FRSM should include the standard operating procedure proposed for the re-aligned process. The Bidder is expected to assist the Bank in aligning the business requirements with the application so as to enable centralization of desired business process, eliminate redundant and duplicate processes, increase operational efficiency and improve customer service.
- Bidder is expected to prepare detailed documentation, presentation, workflows for the business processes affected due to implementation of the **Lead Management System for Marketing Officers.**
- The Bidder shall provide the FRSM to the Bank for review and comments and any comments or suggestions of the Bank will be incorporated therein.
- The Bank will identify functional heads for each process, which would be responsible for the review, comments and sign–off of the FRSM.
- The FRSM will be deemed completed when signed–off from the Bank.

3.17 CUSTOMIZATION

- The Selected Bidder has to carry out all the customization as per the Appendix 01 with no additional cost to the Bank.
- The Bidder needs to provide all statutory and regulatory reports as required by the regulatory institutions. The Bank will not pay any additional customization costs either for gaps observed and/or gaps observed for statutory or regulatory reports as required by the Bank.
- The Bidder will have to provide all the MIS reports as per the requirements of the Bank.

3.18 TRAINING

The Selected Bidder shall provide training for **Lead Management System for Marketing Officers** and updates to staff members of the Bank free of cost wherever required. The Selected Bidder in coordination with the Bank, on request from the Bank, from time to time shall specify the number of trainees, quantum of proposed training, pre-training qualifications required of the trainees and duration of the proposed training. The Selected Bidder shall provide all training material and documents. Conduct of training of Bank's personnel shall be at the Corporate Office or anywhere as may be desired by the Bank at Selected vendor's cost.

4.0 ELIGIBILITY CRITERIA

Bidder, meeting the following minimum criteria as on the date of RFP, are eligible to apply. The Firm not meeting the necessary eligibility criteria will not be considered for further evaluations.

1. **Annual Turnover:** The Selected vendor's minimum Gross Annual Turnover for last **3 consecutive financial years** i.e., **F.Y. 2019-20, 2020-21, 2021-22** should be at least Rs. 5 crores in each of the last 3 F.Y. years as per audited balance sheets**. (For Start-ups the minimum turnover should be Rs. 2 crore in the last F.Y i.e 2021-22)**. Start-ups should provide certificate from competent authority for the same. (The clients can be based out of India or overseas). (Standalone Turnover of the company. applying for the selection will only be reckoned, not of the Group Company or subsidiaries).
2. The Firm shall not have been involved in any major litigation that may have an impact affecting or compromising the delivery of services required.
3. Recognition in the form of industry acclaimed awards specific to Lead Management System would be an added advantage
4. The Firm should have a **minimum experience of at least 3 years (For Startups, the minimum experience of at least 2 years)** in the implementation of Lead Management System and preferably experience in the BFSI sector.
5. The Firm should have a full-fledged office in Mumbai and shall allocate a dedicated team to our Bank. The selected vendor may also require deploying additional resources on site for a task related to Lead Management System at no additional cost as and when required.
6. The Firm, its partners or directors shall not have been blacklisted / debarred by any Central / State Government/Public or Private Sector Undertakings. No complaint should be pending with Government or its agencies. Affidavit, in this regard, should be submitted.
7. The Firm shall not have been involved in any major litigation that may have an impact affecting or compromising the delivery of services required.
8. The Firm is expected to examine all instructions, terms and specifications of this document. Failure to furnish all information required as per this document or submission of the bids not substantially responsive to this document in every respect will be at the selected vendor's risk and may result in rejection of the bid.
9. The Firm will enclose necessary documents and declaration for the above-mentioned eligibility criteria along with application. Bank shall verify the same.

5.0 PERFORMANCE OF THE SELECTED BIDDER

Delivery and performance of the services shall be made by the selected vendor in accordance with the time schedule specified by the Bank in its Service Level Agreement or request for proposal in Lead Management System. In case the services are not made available in the stipulated delivery period, as indicated in the Service Level Agreement or request, the Bank reserves the right either to short close / cancel the work order or request and / or recover liquidated damage charges. The cancellation / short closing of the order shall be at the risk and responsibility of the selected vendor.

Delay by the Selected Vendor in the performance of its delivery obligations, shall render the firm liable to imposition of penalty, and/or termination of the contract for default and/or any other action viz. black listing/ circulation in industry etc. as it may deem fit.

6.0 PAYMENT TERMS

The bidder must accept the payment terms proposed by the Bank. The commercial bid submitted by the bidder must be in conformity with the payment terms proposed by the Bank. Any deviation from the proposed payment terms would not be accepted. The Bank shall have the right to withhold or deduct (in event of SLA breach) any payment due to the selected bidder, in case of delays or defaults on the part of the selected bidder. Such withholding of payment shall not amount to a default on the part of the Bank. If any of the items / activities as mentioned in the price bid is not taken up by the Bank during the course of the assignment, the Bank will not pay the professional fees quoted by the vendor in the price bid against such activity / item. Payment will be made on quarterly basis at the end of each quarter on submission of the performance report provided by the Vendor. Payment will start at the signoff of the pilot implementation.

This rate is required to be quoted in the "Commercial Bid" by all the bidders. (Annexure 2)

GST, Taxes and levies as applicable will be levied separately and the Bank shall pay the same. However, the payment to the selected bidder will be subject to statutory deduction of taxes or other levies, by whatever name called, at source. Bank shall not be liable to pay any other fees or charges, etc. apart from what has been stated above.

7.0 OTHER TERMS

- Payments, if any, shall be made subject to deductions of TDS and such other taxes as may be applicable from time to time.
- Payments shall be made only to the selected vendor after successful execution of any campaign.
- The Selected vendor shall be fully responsible for all claims made by any third party and shall also be responsible for all expenses incurred by the Bank in any litigation initiated by any third party.
- The Selected vendor shall implement the work assigned to it by the Bank on receiving written approval of its estimate submitted to the bank.
- The Bank, may, at any time, by a written order given to the selected vendor, make changes within the general scope of the contract related to terms & references, enlarging the scope, analysis or specifications. If any such change causes an increase or decrease in the cost of, or the time required for the execution of the work, an equitable adjustment shall be made in the contract price or delivery schedule, or both, and the work order shall accordingly be amended.
- The selected vendor will be responsible for obtaining any permission that may be required for undertaking work as detailed in this RFP document. Bank may assist the selected vendor in this regard, wherever possible.
- The selected vendor will at no time resort to plagiarism. Bank will not be a party to any dispute arising on account of plagiarism resorted to by the selected vendor.

8.0 EVALUATION OF OFFERS

Each Recipient acknowledges and accepts that the Bank may, in its sole and absolute discretion, apply whatever criteria it deems appropriate in the selection of vendor - Lead Management System, not limited to those selection criteria set out in this RFP document. The issuance of RFP document is merely an invitation to offer and must not be construed as any agreement or contract or arrangement nor would it be construed as any investigation or review carried out by a Recipient. The Recipient unconditionally acknowledges by submitting its response to this RFP document that it has not relied on any idea, information, statement, representation, or warranty given in this RFP document**.**

9.0 SELECTION PROCEDURE

Bank will formulate an Evaluation committee(s) for making technical and commercial evaluation. This committee(s) will supervise the activities relating to evaluation of technical bids, opening of commercial bids, final selection of Lead Management System vendor, negotiations (if any) on various terms and conditions, etc.

a. All Proposals received will be scrutinized to assess their eligibility based on the eligibility criteria as mentioned under the heading, Eligibility Criteria of this RFP. The proposals which do not meet the eligibility criteria will be rejected, forthwith, or at any stage of detection. (Note: Please submit the signed copies of the Technical Bid (Annexure 1) and Commercial Bid (Annexure 2) in two separate sealed envelopes only which will be used as basis for the legally binding offer.)
b. If deemed necessary Bank may seek clarifications on any aspect from the bidder(s). However, that would not entitle the bidder(s) to change or cause any change in the substances of the bid already submitted.
c. All eligible shortlisted bidders will be called for presentation before the Evaluation Committee. The date for presentation will be intimated to the shortlisted vendors by Email/Telephone.
d. Bank will evaluate only those proposals, which meet the technical eligibility criteria as well as complete and responsive in all respects, for comparison and final selection.
e. Bank will follow the two-bid system i.e., Technical Bid and Commercial Bid. The Commercial bids of only those bidders shall be opened who are found technically qualified and the qualified bidders shall be intimated by the authorized officer.
f. For evaluation, a weighted composite success score will be calculated based on separate evaluations of the Technical Bid (70% weightage) and the Commercial Bid (30% weightage). The High-Level RFP Committee will oversee the evaluation process.
g. Only the parties scoring minimum 60 points out of 100 in the technical bid round will qualify for the commercial bids.
h. For evaluation of the commercial bid, the lowest bidder will be given maximum score. The score of other bidders will be proportionately scaled down as explained under clause **Commercial Bid Evaluation.**
i. The composite final score will be calculated by summing the Technical and Commercial scores.
j. In case of a tie between bidders after combining the technical and commercial score, the bidder with higher technical score would be selected.
k. Bank does not bind itself to accept the lowest or any particular RFP and has the right to refuse any RFP without assigning any reason or select any Bidder that is in the final evaluation list.
l. Bank reserves the sole right for carrying out amendments/modification/changes including any addendum to this RFP document. All Bidders who have received this RFP document shall be notified of the amendment in writing by email or post or Bank's corporate website and all such amendment (s) shall be binding on them.
m. The Bank if desires, may also visit or call the client references mentioned by the bidder for verification.

10.0 DETAILS OF TECHNICAL SCORING

Sr. No	Criteria		Max Marks	Scoring Methodology
A	SELECTED VENDOR PROFILE			
1	Years of Selected vendor Experience in Lead Management System.		15	15 Marks if experience is more than 5 Yrs 10 Marks if experience is more than 4Yrs & upto 5 Yrs 5 Marks if Experience is more than 3Yrs & upto 4 Yrs **For Start-ups:** 15 marks if experience is more than 5 Yrs 10 marks if experience is more than 3Yrs & upto 5 Yrs 5 marks if experience is more than 2Yrs & upto 3 Yrs
2	Quality of Client List and retention of clients. (10 Marks)	BFSI Clients	10	1 to 2 Clients – 2 Marks (Min. 1 Clients retained for more than 3 years) 3 Clients – 6 Marks (Min. 2 Clients retained for more than 3 years) 4 Clients – 8 Marks (Min. 3 Clients retained for more than 3 years) 5 or More than 5 Clients – 10 Marks (Min. 4 Clients retained for more than 3 years)
		Non-BFSI Clients	10	1 to 2 Clients – 2 Marks (Min. 1 Clients retained for more than 3 years) 3 Clients – 6 Marks (Min. 2 Clients retained for more than 3 years) 4 Clients – 8 Marks (Min. 3 Clients retained for more than 3 years) 5 or More than 5 Clients – 10 Marks (Min. 4 Clients retained for more than 3 years)
3	Gross Annual Turnover (GAT) (as defined in eligibility)		15	15 Marks if GAT is more than Rs.15 crore 10 Marks if GAT is more than Rs.10 crore & upto Rs.15 crore 5 Marks if GAT is more than Rs.5 & upto Rs.10 crore **For Start-ups:** 15 marks if GAT is more than Rs.5 crore 10 marks if GAT is more than Rs.3crore & upto Rs.5 crore 5 marks if GAT Rs.2 crores & upto Rs.3 crore
	Total (A)		**50**	

B	**PRESENTATION PARAMETER – Lead Management System**			
5	Past Performance & Credentials	• Strategic Thinking Innovations executed, if any, please specify by giving details. • Awards and Recognition to the Selected vendor in the last 3 years (Industry Recognized) • Proposed Lead Management System for Marketing Officers	20	
6	Recommendation on Lead Management System	• Analyzing the best practices in the industry • Recommending tools/process for Lead Management automation Showcase selected vendor experience in this subject and experience of using/deploying such system/tools.	10	Subjective Evaluation by the Committee
7	Strategy Presentation for Central Bank of India on Lead Management System	• Understanding of Present Position / Perception about Bank in Lead Management. • Quality of Team working for Central Bank of India. • Presentation of sample LMS including action plan / strategy, proposed for the Bank • Timeline for Implementation	20	
	Total (B)		**50**	
	GRAND TOTAL (A+B)		**100**	

Technical Evaluation will be assigned technical points out of maximum of 100 points. Bidders with Technical points of 60 and above, out of 100 will qualify for the evaluation in the commercial process.

10.1 SCORES NORMALIZATION PROCESS:

The Highest evaluated Technical Proposal (Tmax) will be given the maximum technical score T(n) of 70 points.

The Normalized technical scores (Tn) of the other Technical Proposals will be computed as per formula given below:

Tn = (Tb/Tmax) x70

Where Tn = normalized technical score for the bidder under consideration

Tb = absolute technical score for the bidder under consideration

Tmax = maximum absolute technical score obtained by any bidder

10.2 COMMERCIAL BID EVALUATION:

The Commercial bid of those bidders who qualify in the technical evaluation will only be opened. All other Commercial bids will not be opened. The Commercial bids of the technically qualified bidders will be evaluated as per the evaluation criteria mentioned below:

The lowest quoted Commercial proposals (Cmin) will be given the maximum Commercial score

C(n) of 30 points.

The Normalized Commercial scores (Cn) of the other Commercial Proposals will be computed as per formula given below:

Cn = (Cmin / Cb) x 30

Where, Cn = normalized finance score for the bidder under consideration

Cb = absolute commercial score for the bidder under consideration

Cmin = minimum absolute financial score obtained by any bidder

The Bidder with highest **(Tn+Cn)** score will be qualified bidder (successful bidder)

11.0 SUBMISSION OF BID

Interested bidders may submit the Sealed Bid as advised below:

ONLY ONE ENVELOPE SHOULD BE SUBMITTED. THIS ENVELOPE WILL BE SUPER- SCRIBED AS **"RFP FOR SELECTION OF VENDOR- LEAD MANAGEMENT SYSTEM FOR MARKETING OFFICERS"**
The above envelope should contain the following 2 (TWO) sealed envelopes as detailed below:

11.1 SEALED ENVELOPE I

a) It will contain the Technical bid for Selection of Vendors as per format (Annexure 1) enclosed, duly signed by authorized representative of Bidder with company seal. This envelope will be super-scribed as **"RFP for Selection of Vendor – Lead Management System for Marketing Officers – Technical Bid"**. The name and address of the bidder should be mentioned on each envelope.

b) The Technical Bid prepared by the Bidder shall comprise the following components:

c) Technical bid as per the format – Annexure 1

d) Necessary documents as evidence in support of Eligibility Criteria as mentioned earlier.

e) A Corporate brochure of the selected vendor

f) Documentary evidence as per Form A, establishing the bidder's eligibility to bid and qualification to perform the contract if the bid is accepted.

g) Copy of Article and Memorandum of Association / Partnership deed or Proprietorship deed, if any. In case of Article/Memorandum of Association, the scope of work must indicate Lead Management System as business of the firm.

h) In case of any change in the bidder's status due to Merger or Acquisition etc., Kindly provide the documents to support the statutory positions of the selected vendor.

i) Certificate of incorporation

j) Copy of GST Registration, latest Income Tax Return / PAN Card

11.2 SEALED ENVELOPE II

- It should contain Commercial bid **for Selection of vendor - Lead Management System for Marketing Officers** as per Annexure 2 duly signed by authorized representative of Bidder with company seal and super-scribed as **"RFP for Selection of vendor - Lead Management System for Marketing Officers– Commercial Bid".**
  - Open envelopes or envelopes which are not sealed will not be accepted.
  - RFP sent / submitted via courier / speed post shall not be accepted.
  - RFP should be Hand – Delivered.
  - Each bidder acknowledges and accepts that Central Bank of India may, in its sole discretion, apply whatever criteria it deems appropriate in the selection, not limited to those selection criteria set out in this document.

- The bids shall contain no overwriting, except where necessary to correct errors made by the bidder and should be authenticated by the official who has signed the bid.

- An authorized representative of the bidder shall authenticate/sign all pages of the original bid proposal. The authorization of such a representative shall be in the form of a letter or in any other form demonstrating that the representative has been duly authorized to sign and submit the proposal and shall be enclosed to the Proposal.

- The signed proposal shall be marked "ORIGINAL". The agencies should adhere to all instructions and submit relevant documents which have been specified in the RFP. Submission of applications without complying with the instructions will result in their rejection. Please submit the signed copies of the Technical Bid and Commercial Bid in 2 separate sealed envelopes only which will be used as basis for the legally binding offer. The bids should be accompanied by the documents specified in the Annexures to this RFP.

- The Commercial Bid should be quoted and presented in a separate sealed cover.

- The Earnest Money Deposit (EMD) for the application related to empanelment **vendors -Lead Management System for Marketing Officers** shall be Rs 2, 00,000/- (Rupees Two Lacs Only) payable by Bank Guarantee, Demand Draft or Pay Order favoring "Central Bank of India" from any bank other than Central Bank of India payable at Mumbai is to be submitted along with the application Form (Technical Bid). In case of exemption from submission of EMD, the bidder may submit the relevant documents / certifications issued by suitable Authority.
  - The earnest money deposit may be forfeited or the bank guarantee in lieu of EMD may be invoked by the Bank:
  - If the Bidder withdraws its bid during the period of bid validity period specified by the Bidder on the Bid Form; or
  - In case of the successful Bidder, if the Bidder fails to:
  - Sign the Contract within 1 month of issue of purchase order / letter of intent.

Unsuccessful Bidder - Bid security money deposit or bank guarantee will be returned by the Bank within two weeks from closure of the RFP. No interest shall be paid on Bid security money deposit to unsuccessful vendor/bidders.

Successful Bidder – Bid security money deposit or bank guarantee will be discharged upon the selected vendor/bidder furnishing the Service Level Agreement with the bank. The Bid security Money of the successful selected vendor/bidder may be forfeited or the bank guarantee in lieu of Bid security money may be invoked by the Bank if the successful vendor/bidder fails to furnish the Service Level Agreement within 30 days from the date of Bank placing the order for any reason whatsoever and / or the vendor/bidder refuses to accept and sign the contract within 1 month of issue of contract order / letter of intent for any reason whatsoever.

Exemption from submission of EMD and RFP cost shall be given to bidders, who are Micro and Small Enterprises (MSE) and they are exempted from giving EMD may give Bid Security declaration (Annexure – I) in place of EMD. Start-ups (which are not MSEs) are exempted only from Bid security amount. The bidder who are MSE has to submit necessary document issued by competent authority and the bidder who are startups has to be recognized by Department of Industrial Policy & Promotion (DIPP) to avail the exemption. To qualify for EMD and RFP cost exemption, firms should necessarily enclose a valid copy of registration certificate issued by competent authority which is valid on last date of submission of the RFP documents. MSE/startups firms which are in the process of obtaining the registration certificate from competent authority will not be considered for EMD and RFP cost exemption.

I. The completed proposal (Technical Bid) to be submitted along with the requisite enclosures and demand draft of Rs. 5,000/- towards Non-refundable fee/ cost of RFP (non-refundable) favoring "Central Bank of India" payable in Mumbai.

II. Central Bank of India shall not be responsible for misplacement, losing or premature opening, if the outer envelope is not sealed and/or marked as stipulated. This circumstance may be a cause for rejection of Proposal and no communication will be entertained in this regard.

The ONE ENVELOPE should be clearly marked "**"RFP for Selection of Vendor – Lead Management System for Marketing Officers** and should be **hand – delivered** on or before, _____.2022, before 3:00 p.m. to ____

Chief Marketing Officer/DGM
16th Floor, Marketing Department
Chandermukhi Building
Central Bank of India
Nariman Point, Mumbai-400021

11.3 VALIDITY PERIOD

RFP Responses must remain valid and open for evaluation according to their terms for a period of at least 120 days from the last date of submission of responses. The Bank shall have the right at its sole and absolute discretion to continue the assignment with the Applicant/s for future requirement on the rates finalized in this processing for various items/activities as described in the Price Bid (to be submitted after appointment), or at the price negotiated thereafter, after expiry of current assignment period. In exceptional circumstances, the Bank may solicit the Applicant/s consent to an extension of period of validity.

12.0 CENTRAL BANK OF INDIA RESERVES THE RIGHT:

a. To accept or reject any or all the proposals.

b. Cancel the RFP process at any time without assigning any reasons therefore, Re- issue the RFP, if cancelled

c. The appointed vendor will have to execute a contract with the Bank in the format approved by Central Bank of India, which will be delivered to them upon their appointment.

d. The Selected Vendor or its personnel shall not disclose any confidential/vital information which are disclosed / provided to them during the course of briefing or any discussion or acquired by the vendor to any third party without prior permission of Bank and such information will be kept confidential even after the termination/expiry of the agreement. **The selected vendor shall be required to sign a non-disclosure agreement with Central Bank of India to this effect and this effect in the contract to be executed with Central Bank of India.**

e. Bank shall make every effort to issue instructions and approval in writing to the selected vendor. However, if the same is conveyed verbally, the selected vendor shall get it confirmed immediately from Central Bank of India at the earliest in writing to avoid disputes.

f. The Selected vendor is expected to be sincere and prompt in responding to the call of Bank. The execution of job is to be time bound and with all required information so as to avoid delay or duplication. The selected vendor should be able to execute order at short notices and even on holidays.

g. The rates approved by Bank shall be treated as final. In case of any revision thereof for whatever reasons, the Selected vendor shall intimate the same to Bank immediately and seek fresh approval.

h. Proposal must be strictly as per bid application (Form A and B) and photocopy of all required documents should be attached as duly marked/ numbered enclosures. A list of required documents that needs to be enclosed with bid application and their tag Nos. are given at the end of bid application/proposal and these should be arranged in this order only. All photocopies attached with bid application should be verified by the authorized signatories under his signature and bidder's/company's seal.

12.1 CANCELLATION OF ORDER / TERMINATION OF CONTRACT

Bank shall have option to terminate / cancel this RFP at any stage without any prior notice. In following events Bank shall terminate this assignment or cancel any particular order if Selected vendor:

- breaches any of its obligations set forth in this assignment or any subsequent agreement and Such breach is not cured within thirty (30) Working Days after Bank gives written notice; or
- failure by Selected vendor to provide Bank, within thirty (30) Working Days, with a reasonable plan to cure such breach, which is acceptable to the Bank. Or
- The progress regarding execution of the contract/ services rendered by the Service Provider is not as per the prescribed time line, and found to be unsatisfactory.
- Supply of sub-standard materials/ services;
- Delay in delivery / installation / commissioning of services.

This RFP or subsequent Agreement shall be deemed to have been terminated by either Party one day prior to the happening of the following events of default:

- The other Party becomes unable to pay its debt as they fall due or otherwise enters into any composition or arrangement with or for the benefit of its creditors or any class thereof;
- A liquidator or a receiver is appointed over all or a substantial part of the undertaking, assets or revenues of the other Party and such appointment continues for a period of twenty-one (21) days;
- The other Party is subject of an effective resolution for its winding up other than a voluntary winding up for the purpose of reconstruction or amalgamation upon terms previously approved in writing by the other Party; or
- The other Party becomes the subject of a court order for its winding up.

Notwithstanding above, in case of change of policy or any unavoidable circumstances Bank reserve the right to terminate this assignment or any subsequent agreement and / or any particular order, in whole or in part by giving Selected vendor/bidder at least 30 days prior notice in writing.
In the event, the Bank terminates the contract in whole or in part pursuant to the above, the Bank reserves the right to get the remaining services executed by another vendor of its choice, by giving 30 days notice and in that eventuality the Selected vendor is bound to make good the additional expenditure, that the bank may have to incur in executing the remaining part of the contract.

- Delivery of the solution and performance of the services shall be made by the selected bidder in accordance with the time schedule, technical specification, scope of the project and other terms & conditions as specified in the RFP / Contract. Any delay in performing the obligation / defect in performance by the consultant may result in imposition of liquidated damages.

- If the selected bidder fails to perform services within the stipulated time schedule, the Bank shall, without prejudice to its other remedies under the contract, deduct from the contract price, as penalty, a sum equivalent to 5% of the Total Contract Value for delay by a fortnight or part thereof maximum up to 10% of Total Contract Value. Once the maximum is reached, Central Bank of India may consider termination of Contract pursuant to the conditions of contract.

- In the event Bank terminates the Contract in whole or in part, Bank may procure, upon such terms and in such manner, as it deems appropriate, services similar to those not delivered by the selected bidder and the selected bidder shall be liable to the Bank for any excess costs for such similar systems or services. However, the selected bidder shall continue the performance of the contract to the extent not terminated.

12.2 EFFECT OF TERMINATION

If Bank terminate or cancel the assignment on the default mentioned in the termination clause, in such case CENTRAL BANK OF INDIA reserves the right to get the balance contract executed by another party of its choice. In this event, the Service Provider shall be bound to make good the additional expenditure, which the Bank may have to incur to carry out bidding process for the selection of a new service provider and for execution of the balance of the contract.

Immediately upon the date of expiration or termination of the RFP and subsequent Agreement, Bank shall have no further obligation to pay any fees for any periods commencing on or after such date.

Without prejudice to the rights of the Parties, upon termination or expiry of this RFP and subsequent Agreement, Bank shall pay to Bidder, within thirty (30) days of such termination or expiry, of the following:

- All the undisputed fees outstanding till the date of termination;
- Upon the termination or expiry of this RFP and subsequent Agreement, the rights granted to Bidder shall immediately terminate.
- Upon Bank's request, with respect to (i) any agreements for maintenance, disaster recovery services or other third-party services, and any Deliverables not owned by the Bidder, being used by Bidder to provide the Services and (ii) the assignable agreements, Bidder shall, use its reasonable commercial endeavors to transfer or assign such agreements and Bidder Equipment to Bank and its designee(s) on commercially reasonable terms mutually acceptable to both Parties.
- Upon Bank's request in writing, Bidder shall be under an obligation to transfer to Bank or its designee(s) the Deliverables being used by Bidder to perform the Services free and clear of all liens, security interests, or other encumbrances at a value calculated as stated.

12.3 PUBLICITY

Any publicity by the Bidder in which the name of the Bank is to be used should be done only with the explicit written permission of the Bank.

12.4 SET OFF

Without prejudice to other rights and remedies available to Bank, Bank shall be entitled to earmark set-off or adjust any amounts due to Bank under any of the clauses of this agreement for delay, failure or non-performance of any condition, undertaking and commitment or for breach of any terms of this agreement.

This clause shall override all other clauses of this document and shall also survive the termination.

12.5 ERRORS AND OMISSIONS

Each Recipient should notify the Bank of any error, fault, omission, or discrepancy found in this RFP document but not later than five business days prior to the due date for lodgment of Response to RFP.

12.6 ACCEPTANCE OF TERMS

A Recipient will, by responding to the Bank's RFP document, be deemed to have accepted the terms as stated in this document.

12.7 COST BORNE BY BIDDER

All cost and expenses (whether in terms of time or money) incurred by the bidder in any way associated with the development, preparation and submission of responses, including but not limited to attendance at meetings, discussion etc. and providing any additional information required by the Bank will be borne entirely and exclusively by the bidder.

12.8 NO LEGAL RELATIONSHIP

No binding legal relationship will exist between any of the bidders and the Bank until execution of a contractual agreement to full satisfaction of the Bank.

12.9 BIDDER OBLIGATION TO INFORM ITSELF

The BIDDER must apply its own care and conduct its own investigation and analysis regarding any information contained in the RFP document and the meaning and impact of that information.

12.10 SUBCONTRACTS

The Selected vendor as and when required may subcontract the work provided with prior permission from the Bank. The Selected vendor shall be solely responsible for the performance, Salary, remuneration, statutory deductions of sub-contractors appointed by it.

13.0 SUBMISSION OF BIDS

RFP complete in all respects may be submitted ONLY IN PERSON to the Dy.General Manager/CMO (Marketing), Central Bank of India, 16th Floor, Chander Mukhi Building,Nariman Point,Mumbai-400021 on Bank's working days from Monday to Friday: Time 10.00 am to 5.00 pm and 1st, 3rd and 5th Saturday:10.00 am to 5 pm. RFPs received after due date & time shall not be entertained. RFPs received by post or courier will also not be entertained.

Central Bank of India shall at its discretion, extend this deadline for submission of bids by amending the bid documents, in which case all rights and obligations of Central Bank of India and bidder previously subject to the deadline will thereafter be subjected to the deadline as extended.

Any bid received by Central Bank of India after the deadline for submission of bids shall be rejected outright.

13.1 MODIFICATION AND WITHDRAWAL OF BIDS

The vendor may modify or withdraw its bid after submission provided that the written notice of the modification or withdrawal is received by the Bank before the deadline prescribed for submission of bids.

Modification or withdrawal notice shall be prepared, sealed, marked and dispatched by the bidder. A withdrawal notice may also be sent by email but followed by the signed confirmation copy by post or courier, not later than the deadline for submission of bids. No bid shall be modified subsequent to the deadline for submission of bids.

Bidders may request clarifications on any clause of the RFP documents by raising queries via email to **agmmarketing@centralbank.co.in** before the time and date stipulated for the said purpose. However, it may be noted that non-receipt of reply to the queries raised by an interested entity shall not be accepted as a valid reason for non- submission of offer or delayed submission.

Bank may at its sole discretion, but without being under any obligations to do so, amend, update, clarify, modify or supplement the RFP by issuing an addendum/corrigendum/clarification in writing, which, if any, will be posted on the bank's website and shall be binding on all the concerned. To enable the bidders to take into account the impact of the amendments in their proposals, Bank may, at its sole discretion, extend the deadline for submission of proposals.

13.2 CLARIFICATION OF BID DOCUMENTS BY THE BIDDER

A prospective vendor, requiring any clarification on the Bid Documents shall notify Central Bank of India in writing or by E-MAIL at Central Bank of India's mailing address indicated in the invitation of Bid at least 7 days prior to submission of the RFP.

Central Bank of India shall respond in writing or by E-mail to any request for the Clarification of the Bid Documents, which it receives not later than 2 days prior to the date of submission of the RFPs. Such queries (without identifying the source) will be clarified by Central Bank of India and will be displayed on Bank's website.

13.3 CLARIFICATION OF BIDS BY BANK

To assist in the examination, evaluation and comparison of bids, Central Bank of India may, at its discretion ask the bidder for the clarification of its bid. The request for the clarification and the response shall be in writing. However, no post bid clarification at the initiative of the bidder shall be entertained.

13.4 AMENDMENTS IN DOCUMENTS

At any time, prior to the date of submission of Bids, Central Bank of India may, for any reason, whether at its own initiative or in response to a clarification requested by a prospective selected vendor, modify bid documents by amendments.

The amendments shall be notified in Bank's website www.centralbankofindia.co.in and these amendments will be binding on the Bidders.

In order to afford prospective vendor a reasonable time to take the amendment into account in preparing their bids, Central Bank of India may, at its discretion, extend the deadline for the submission of bids suitably.

13.5 POWERS TO VARY OR OMIT WORK

No alterations, amendments, omissions, additions, suspensions or variations of the work (hereinafter referred to as variation) under the contract shall be made by the successful bidder except as directed in writing by Bank.

The Bank shall have full powers, subject to the provision herein after contained, from time to time during the execution of the contract, by notice in writing to instruct the successful bidder to make any variation without prejudice to the contract. The finally selected bidder shall carry out any such variation and be bound by the same conditions as far as applicable as though the said variations occurred in the contract documents.
Any suggested variations if implemented, would, in the opinion of the finally selected bidder, prevent them from fulfilling any of his obligations under the contract, the bidder shall notify the Bank thereof in writing with reasons for holding such opinion and Bank may instruct the successful bidder to make such other modified variation without prejudice to the contract.

The finally selected bidder shall carry out such variation and be bound by same conditions as far as applicable as though the said variations occurred in the contract documents. If the Bank confirms the concerned bidder's instructions, the successful bidder's obligations shall be modified to such an extent as may be mutually agreed, if such variation is substantial and involves considerable commercial implications.

Any agreed difference in cost occasioned by such variation may be added to or deducted from the value of the contract as the case may be.
In any case where the successful bidder has received instructions from the Bank as to the requirement of carrying out the altered or additional substituted work which either then or later on, will in the opinion of the finally selected bidder involve a claim for additional payments, such additional payments shall be mutually agreed in line with the terms and conditions of the order.

If any change in the work is likely to result in reduction in cost, the parties shall agree in writing so as to the extent of change in contract price, before the finally selected bidder proceeds with the change. In all the above cases, in the event of a disagreement as to the reasonableness of the said sum, the decision of Bank shall prevail.

13.6 RIGHT TO ACCEPT ANY BID AND TO REJECT ANY OR ALL BIDS

Central Bank of India reserves the right to accept or reject any bid, and to annul the bidding process and reject all bids, at any time prior to award of contract without assigning any reason whatsoever and without thereby incurring any liability to the affected bidders or firms on the grounds of Central Bank of India's action.

14.0 OPENING OF BIDS BY CENTRAL BANK OF INDIA

Central Bank of India shall open the Technical bid (Envelope I) in the presence of authorized representatives of the bidders. However, Technical Bids would be opened even in the absence of any or all of the bidders representatives and the Evaluation Committee will study the Technical bids.

The Commercial bid will be opened only for Bidders declared eligible and selected after Technical evaluation as mentioned in this document. The commercial bid will be opened on a fixed date in the presence of authorized representatives of the bidders and will be intimated to all eligible bidder at least two days in advance.

14.1 AWARD OF SELECTION

Central Bank of India shall consider selection of vendor, whose offer have been found technically, commercially and financially acceptable and evaluated as the most suitable by Central Bank of India. The Selected Vendor will have to enter into an agreement with Central Bank of India as per terms and conditions in this RFP document.

14.2 ASSIGNMENTS

The Selected Vendor agrees that it shall not be entitled to assign any or all of its rights and or obligations under this RFP and subsequent Agreement to any entity including Selected vendor's affiliate without the prior written consent of the Bank. If the Bank undergoes a merger, amalgamation, takeover, consolidation, reconstruction, change of ownership, etc., this RFP shall be considered to be assigned to the new entity and such an act shall not affect the rights or liabilities of the Selected vendor under this RFP.

15.0 GENERAL CONDITIONS

The general condition shall apply in contracts made by the Bank for availing the services of Selected Vendor.

The selected vendor shall abide by all relevant rules and regulations of the Government as issued from time to time and also to obtain all licenses, consents and permits, as may be required for the delivery / performance of the services from time to time. Selected vendor shall be responsible for adhering to other industry norms applicable to their area of business.

16.0 OWNERSHIP OF INTELLECTUAL PROPERTY RIGHTS

The selected vendor shall indemnify Central Bank of India against any third party claims of infringement of patent, copyright, trademark or industrial design, intellectual property rights arising from use of any design/model if any under the scope of contract including all legal and court costs and expenses, court awarded damages/compensation, out of pocket expenses etc. incurred by Central Bank of India.

- The selected vendor at its own cost will defend or settle any claim against Central Bank of India to the effect that the selected vendor infringed any Intellectual Property Rights, trade mark, copy right etc. of any person (including third party).

- In the event of any actions being contemplated or instituted against the Bank, for alleged infringement of any intellectual property right or other statutory or common law rights, the Bank reserves the right to cancel immediately its contract or part thereof yet to be undertaken and the Selected vendor shall compensate / repay the Bank any of the commission already paid to the Selected vendor or any other loss that might be incurred by the Bank.
- Central Bank of India through its authorized officers shall have right to inspect the services regarding conduct of Lead Management services for the Bank. Should any inspection point to the need of improvement, the necessary alteration shall be incorporated free of cost by the selected vendor.
- Central Bank of India reserves the right to disqualify such vendors who have a record of not meeting contractual obligations against earlier contracts entered into with Central Bank of India.
- Central Bank of India reserves the right to blacklist the selected vendor for a suitable period in case the selected vendor fails to honor its bid without sufficient grounds and circulate its names to IBA, RBI and other peer banks.
- The selected vendor shall ensure secrecy of Lead Management related brief, other data which is shared, its findings & recommendations etc.
- The selected vendor shall ensure proper typography and lay out for each advertisement so that minimum space will be spent as far as possible.

17.0 EARNEST MONEY DEPOSIT (EMD) & NON-REFUNDABLE COST OF RFP

- The Earnest Money Deposit (EMD) for the application related to selection of vendor - Lead Management System for Marketing Officers shall be Rs 2,00,000/- (Rupees Two Lacs Only) payable in the form of Demand Draft favoring "Central Bank of India" payable at Mumbai. Proposals not accompanied by EMD shall be rejected as non- responsive. The Earnest Money Deposit (EMD) of the successful bidder will be refunded after signing an agreement with the Bank and submission of the Performance Bank Guarantee (PBG). The bank guarantee should be issued by any scheduled commercial bank, other than Central Bank of India.

  The EMD shall be forfeited in the event of withdrawal of bid during the period of bid validity or if the successful bidder fails to sign the contract in accordance with the terms and conditions and other requirements specified in RFP or any act of the bidder not in line with contract obligations.
- Unsuccessful bidders EMD will be discharged/refunded after selection of the successful bidders.
- Non-refundable Cost of RFP shall be Rs 5000/- (Rupees Five thousand only) payable by Demand Draft or Pay Order favoring "Central Bank of India" payable at Mumbai is to be submitted separately along with the application form.
- The selected vendor shall not use the name of the Bank or its logo to promote their business without prior permission from Central Bank of India.
- In case of exemption from submission of EMD, the bidder may submit the relevant documents / Certifications issued by suitable Competent Authority along with duly filled Annexure I.

18.0 CONTACTING CENTRAL BANK OF INDIA

The bidder shall do any such act or omission which has the effect of influencing Central Bank of India on any matter relating to their bid and award of contract at any stage. Any effort by the bidder to influence Central Bank of India in bid evaluation, bid comparison or contract award decision shall result in the rejection of the bid.

19.0 CORRUPT AND FRAUDULENT PRACTICES

As per Central Vigilance Commission (CVC) directives, it is required that Bidders / Suppliers / Contractors observe the highest standard of ethics during the procurement and execution of such contracts in pursuance of this policy:

a. “Corrupt Practice” means the offering, giving, receiving or soliciting of anything of values to influence the action of an official in the procurement process or in contract execution AND

b. “Fraudulent Practice” means a misrepresentation of facts in order to influence a procurement process or the execution of 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.

The Bank reserves the right to reject a proposal for award if it determines that the Bidder recommended for award has engaged in corrupt or fraudulent practices in competing for the contract in question.

The Bank reserves the right to declare a firm ineligible, either indefinitely or for a stated period of time, to be awarded a contract if at any time it determines that the firm has engaged in corrupt or fraudulent practices in competing for or in executing the contract

20.0 INDEMNITY

The Vendor/Bidder shall indemnify the Bank, and shall always keep indemnified and hold the Bank and its employees, personnel, officers, directors, (hereinafter collectively referred to as “Personnel”) harmless from and against any and all losses, liabilities, claims, actions, costs and expenses (including attorneys' fees) relating to, resulting directly or indirectly from or in any way arising out of any claim, suit or proceeding brought against the Bank as a result of:

- Bank’s authorized / bona fide use of the deliverables and /or the Services provided by Vendor/bidder under this assignment; and/or
- Negligence or willful misconduct of the Vendor/Bidder and/or its employees, agents, sub-contractors in performance of the obligations under this assignment; and/or
- claims made by employees or subcontractors or subcontractors’ employees, who are deployed by the Vendor/Bidder, against the Bank; and/or
- claims arising out of employment, non-payment of remuneration and non-provision of statutory benefits by the Vendor/Bidder to its employees, its agents, contractors and sub-contractors
- or breach of any terms, representation or false representation or inaccurate statement or assurance or covenant or warranty of the Vendor/Bidder under this assignment; and/or
- breach of confidentiality obligations of the Vendor/Bidder; and/or
- any or all Deliverables or Services infringing any patent, trademarks, copyrights or such other Intellectual Property Rights;

Bank shall notify the **Vendor/Bidder** in writing as soon as practicably possible when the Bank becomes aware of the claim, and shall co-operate with the **Vendor/Bidder** in the defense and settlement of the claims.

The **Vendor/Bidder** shall have sole control of the defense and all related settlement/ negotiations, and Bank will provide the **Vendor/Bidder** with the assistance, information and authority reasonably necessary to perform the above.

In the event of successful bidder not fulfilling its obligations under this clause within the period specified in the notice issued by the Bank, Bank has the right to recover the amounts due to it under this provision from any amount payable to the **Vendor/Bidder** under this assignment. The indemnities under this clause are in addition to and without prejudice to the indemnities given elsewhere in this RFP.

21. SETTLEMENT OF DISPUTES

- The Bank and the selected bidder shall make every effort to resolve amicably, by direct informal negotiation between the respective project managers / directors of the Bank and the vendor/bidder, any disagreement or dispute arising between them under or in connection with the contract.

- If the Bank project manager / director and selected bidder project manager / director are unable to resolve the dispute after thirty days from the commencement of such informal negotiations, they shall immediately escalate the dispute to the senior authorized personnel designated by the vendor/bidder and Bank respectively.

- If after thirty days from the commencement of such negotiations between the senior authorized personnel designated by the selected bidder and Bank, the Bank and the selected bidder have been unable to resolve contractual dispute amicably, either party may require that the dispute be referred for resolution through formal arbitration.

- All questions, disputes or differences arising under and out of, or in connection with the contract or carrying out of the work whether during the progress of the work or after the completion and whether before or after the determination, abandonment or breach of the contract shall be referred to arbitration by a sole Arbitrator acceptable to both parties OR the number of arbitrators shall be three, with each side to the dispute being entitled to appoint one arbitrator. The two arbitrators appointed by the parties shall appoint a third arbitrator shall act as the chairman of the proceedings. Seat of Arbitration will be at Mumbai. The Arbitration and Conciliation Act 1996 or any statutory modification thereof shall apply to the arbitration proceedings. Judgment upon the award may be entered by any court having jurisdiction thereof or having jurisdiction over the relevant Party or its assets.

22.0 GOVERNING LAWS

This RFP and the subsequent contract shall be governed and construed and enforced in accordance with the laws of India. Both Parties shall agree that in respect of any dispute arising upon, over or in respect of any of the terms of this Agreement, only the courts in Mumbai shall have exclusive jurisdiction to try and adjudicate such disputes to the exclusion of all other courts.

23.0 FORCE MAJEURE

The Bidder shall not be liable for forfeiture of its performance security, liquidated damages, penalties or termination for default, if any to the extent that its delay in performance or other failure to perform its obligations under the contract is the result of an event of Force Majeure.

For purposes of this Clause, "Force Majeure" means an event explicitly beyond the reasonable control of the Bidder and not involving the Bidder's fault or negligence and not foreseeable. Such events are Acts of God or of public enemy, acts of Government of India in their sovereign capacity, strikes, political disruptions, bandhs, riots, civil commotions, pandemic and acts of war.

If a Force Majeure situation arises, the Bidder shall promptly notify the Bank in writing of such conditions and the cause thereof within fifteen calendar days. Unless otherwise directed by the Bank in writing, the Bidder shall continue to perform Bidder's obligations under this Agreement as far as is reasonably practical, and shall seek all reasonable alternative means for performance not prevented by the Force Majeure event.

In such a case the time for performance shall be extended by a period(s) not less than duration of such delay. If the duration of delay continues beyond a period of three months, the Bank and Bidder shall hold consultations in an endeavor to find a solution to the problem. However, financial constraints by way of increased cost to perform the obligations due to any reason, if the obligations can be performed otherwise, shall not be treated as a force majeure situation. Notwithstanding the above, the decision of the Bank regarding whether the event so claimed by the bidder is a force majeure event or not. Shall be final and binding on the Bidder.

24.0 INSPECTION OF RECORDS

All bidder records with respect to any matters covered by this RFP shall be made available to auditors and or inspecting officials of the Bank and/or Reserve Bank of India and/or any regulatory authority, at any time during normal business hours, as often as the Bank deems necessary, to audit, examine, and make excerpts or transcripts of all relevant data. Said records are subject to examination. Bank's auditors would execute confidentiality agreement with the bidder provided that the auditors would be permitted to submit their findings to the Bank, which would be used by the Bank. The cost of the audit will be borne by the Bank. The scope of such audit would be limited to Service Levels being covered under the contract, and financial information would be excluded from such inspection, which will be subject to the requirements of statutory and regulatory authorities.

25.0 VISITORIAL RIGHTS

The Bank and its authorized representatives, including Reserve Bank of India (RBI) or any other regulator shall have the right to visit any of the Selected vendor's premises without prior notice to ensure that data provided by the Bank is not misused. The Bidder shall cooperate with the authorized representative/s of the Bank and shall provide all information/ documents required by the Bank

26.0 VIOLATION OF TERMS

The Bank clarifies that the Bank shall be entitled to an injunction, restraining order, right for recovery, suit for specific performance or such other equitable relief as a court of competent jurisdiction may deem necessary or appropriate to restrain the Bidder from committing any violation or enforce the performance of the covenants, obligations and representations contained in this RFP document. These injunctive remedies are cumulative and are in addition to any other rights and remedies the Bank may have at law or in equity, including without limitation a right for recovery of any amounts and related costs and a right for damages.

27.0 AUTHORIZED SIGNATORY

The selected Bidder shall indicate the authorized signatories who can discuss and correspond with the Bank, with regard to the obligations under the contract. The selected Bidder shall submit at the time of signing the contract, a certified copy of the resolution of their Board, authenticated by Company Secretary/Director, authorizing an official or officials of the company or a Power of Attorney copy to discuss, sign agreements/contracts with the Bank. The Bidder shall furnish proof of signature identification for above purposes as required by the Bank.

28.0 CONFLICT OF INTEREST

Central Bank of India requires that firms provide professional, objective and impartial services and at all times hold Bank's interest's paramount, strictly avoid conflicts with other Assignment(s)/ Job(s) or their own corporate interests and act without any expectations/ consideration for award of any future assignment(s) from Bank.

Firms shall have an obligation to disclose any situation of actual or potential conflict that impacts their capacity to serve the best interest of Central Bank of India, or that may reasonably be perceived as having this effect. If the Firm fails to disclose said situations and if Bank comes to know about any such situation at any time, it may lead to the disqualification of the Firm during bidding process or the termination of its Agreement during execution of assignment. Employees of Central Bank of India shall not work as, for or be a part of the firm/company or vendor. Similarly, employees of the Firm shall not have any right of employment in the Bank.

29.0 SERVICE LEVEL AGREEMENT AND NON-DISCLOSURE AGREEMENT

The selected vendor shall execute **(a) service level agreement, which must include all the services and terms and conditions of the services to be extended as detailed herein, and as may be prescribed or recommended by the Bank and b) Non- Disclosure Agreement (NDA**). The selected vendor shall execute the agreements within two months from the date of acceptance of letter of appointment or as intimated by the Bank. The all the expenses related to execution of the document such as The applicable stamp duty and registration charges if any shall be borne by the selected vendor/bidder.

30.0 CENTRAL BANK OF INDIA RESERVES THE RIGHT TO

a) Reject any and all responses received in response to the RFP
b) Waive or Change any formalities, irregularities or inconsistencies in proposal format delivery
c) Extend the time for submission of all proposals
d) Select the most responsive bidder (in case no bidder satisfies the eligibility criteria in totality)
e) Select the next most responsive bidder if negotiations with the bidder of choice fail to result in an agreement within a specified time frame.
f) Share the information/ clarifications provided in response to RFP by any bidder, with any other bidder(s) /others, in any form.
g) Cancel the RFP/RFP at any stage, without assigning any reason whatsoever.
h) Change the time schedule of the RFP for inviting the bids or evaluation thereof
i) Modify the quantity or any specifications related to eligibility or technicalities.
j) no obligation to accept the lowest or any other offer received in response to the RFP and shall be entitled to reject any or all of the offers. Bank has full rights to reissue the RFP / bid for any reasons felt necessary by the Bank. The Bank's decision in this regard shall be final, conclusive and binding upon the Bidder.

31.0 NO LIABILITY

All employees engaged by the Service Provider shall be in sole employment of the Selected vendor shall be solely responsible for their salaries, wages, statutory payments etc. That under no circumstances shall CENTRAL BANK OF INDIA be liable for any payment or claim or compensation (including but not limited to compensation on account of injury/death/termination) of any nature to the employees and personnel of the Service Provider.

Bank shall not be held liable for and is absolved of any responsibility or claim/litigation arising out of the use of any third-party software or modules supplied by the Selected vendor as part of this Agreement. Under no circumstances CENTRAL BANK OF INDIA shall be liable to the Selected vendor for direct, indirect, incidental, consequential, special or exemplary damages arising from termination of this Agreement, even if CENTRAL BANK OF INDIA has been advised of the possibility of such damages, such as, but not limited to, loss of revenue or anticipated profits or lost business.

Subject to any law to the contrary, and to the maximum extent permitted by law neither parties shall be liable to other for any consequential/ incidental, or indirect damages arising out of this agreement.

32.0 COVENANTS OF THE BIDDER

It is duly incorporated, validly existing and in good standing under as per the laws

It has the corporate power and authority to enter into Agreements and perform its obligations there under. The execution, delivery and performance of terms and conditions of this assignment by Selected Vendor and the performance of its obligations under this project are duly authorized and approved by all necessary action and no other action on the part of Selected Vendor is necessary to authorize the execution, delivery and performance under an Agreement. The Selected vendor shall deploy and engage suitably experienced and competent personnel as may reasonably be required for the performance of the services. During the currency of this Agreement, the Selected vendor shall not substitute the key staff identified for the services mentioned in this Agreement. The Selected vendor shall forthwith withdraw from deployment or bar any of its employee/s from providing the services if, in the opinion of Bank:

(i) The quality of services rendered by the said employee is not in accordance with the quality specifications stipulated by Bank; or
(ii) The engagement or provision of the services by any particular employee is prejudicial to the interests of Bank.

- Shall be responsible for all negotiations with personnel relating to salaries and benefits, and shall be responsible for assessments and monitoring of performance and for all disciplinary matters.
- Shall not knowingly engage any person with a criminal record/conviction and shall bar any such person from participating directly or indirectly in the provision of services under this Agreement.
- Shall at all times use all reasonable efforts to maintain discipline and good order amongst its personnel who are working in the premises of bank.
- shall not exercise any lien on any of the assets, documents, instruments or material belonging to CENTRAL BANK OF INDIA and in the custody of the **Selected vendor** for any amount due or claimed to be due by the **Selected vendor** from CENTRAL BANK OF INDIA.

- Shall regularly provide updates to CENTRAL BANK OF INDIA with respect to the provision of the services and shall meet with the personnel designated by CENTRAL BANK OF INDIA to discuss and review its performance at such intervals as may be agreed between the Parties.
- shall be responsible for compliance of all laws, rules, regulations and ordinances applicable in respect of its employees, sub-contractors and agents (including but not limited to Minimum Wages Act, Provident Fund laws, Workmen's Compensation Act) and shall establish and maintain all proper records including, but not limited to, accounting records required by any law, code, practice or corporate policy applicable to it from time to time, including records and returns as applicable under labour legislations.
- Shall not violate any proprietary and intellectual property rights of CENTRAL BANK OF INDIA or any third party, including without limitation, confidential relationships, patent, trade secrets, copyright and any other proprietary rights in course of providing services hereunder. shall ensure that the quality and standards of materials and services to be delivered or rendered hereunder, will be of the kind, quality and timeliness as specified by bank from time to time.
- Shall not work in a manner which, in the reasonable opinion of Bank, may be detrimental to the interests of CENTRAL BANK OF INDIA and which may adversely affect the role, duties, functions and obligations of the **Selected vendor** as contemplated by this Agreement.

Chief Marketing Officer/DGM
16^{th} Floor, Marketing Department
Chandermukhi Building
Central Bank of India
Nariman Point, Mumbai-400021

APPENDIX I

User Management

User management functionality is used to create users, provide user login and password and to give authorizations to the users. To be able to work in the system, users must have authorizations or permissions based on the role they have been assigned.

- Module Based Dashboards: Module wise dashboards that show a summary of Tasks assigned and activities carried out by the user.
- Add/Edit/Delete- Admin or the permitted user can create new users, edit their details or delete the user.
- All the mobile users will link with the device also.
- If they need to change their device, they need to get the permission from management
- User Role & Permissions: To set specific access permissions based on user role within the organization.
- User Activity Tracking: Tracks all activities of the user and will keep a history of the same for analysis.
- Attendance Punch-in/Punch-out: Captures daily punch-in and punch-out of the user.
- Location Tracking: GPS based location tracking.
- Notifications & Messages: Option to communicate with the user and user can revert back to the admin/authority.

Lead Management

Should be a complete lead repository consisting of customer Information, lead information and contact records. It should help to track the communications with the team and the customer and thereby keeping a complete track record of every activity carried under a lead. Approve genuine leads and assign Follow-up tasks to the sales team.
Module based dashboard

- Lead Add/Bulk import: Can add every lead one by one or can import the lead in bulk quantity via CSV file in a predefined format.
- Lead source: Lead source master management to filter the leads according to the source.
- Track Lead Stages: Leads which will be at various points of activity will be categorised using stages.
- Lead Activity Tracking: Tracks all the activity under every lead and keeps a history of the same, which will be useful during references or checking client records.
- Lead Assign: Assign Leads to User/Zone/ Regions /Branches/ On Pan India basis.
- All activity history of each lead will be saved and displayed

Customer 360

Full details view of the customer with relevant information like address and contact number and the activity history associated with. Also, users can view all the scheduled activities here. From this feature all the information about the customer and follow-up history can be

Document Management

Documents related to the leads can be uploaded to corresponding leads. So, the manager or admin can access the documents from their dashboard about these leads.

Brochure Management

Keep a repository of product brochures and other product related documents for sharing with clients. Also, Marketing Officers will get information about the new products.

Target Management

Target management enables them to generate peak performance and make the team more productive. Yearly and monthly target can be given to Marketing Officers in amount or quantity.

- Module based dashboard: Module wise dashboards that show a summary of Tasks assigned and activities carried out by the user.
- Target Assign: Assign targets to User/Region (Metro / Urban / Semi -Urban).
- Target Achievement Status/Reports.
- Petrol Reimbursement according to target achievement.
- Cash incentive according to the target achievement.

EMI Calculator

EMI calculation for given inputs (Option to change of Rate of Interest) fill manually (Tenure wise – Interest and principal wise).

Campaign

Using the campaign features the admins can create Campaign and assign users to it. The leads that are collected under each campaign will be allocated respectively.

Sales

The Leads that have been marked as converted, will be treated as Sales and moved to this section.

- Sales marking against leads (Conversion against lead): Leads that have been converted into sales will be shown here.
- Sales list (list – How many sales have been converted): List of sales with search and filter facility.

Expense

The users can update the daily expense occurring during their field/shop visits. This will be subjected for approval from the authority for disbursement of expense claim.

- Add expense: Adding expense with requested data like type of expense, amount and option to add any attachments like invoice etc.
- Expense approval/rejection: Expense added in the system will be verified by the authority and will be subjected to approval/rejection.
- Detail Report: Custom detailed report will be available.

Attendance

This feature will be useful to get information of the users that are available at work or who have taken a leave with respective reasons**.** Punch-in/Punch-out option is given at the App dashboard to capture the attendance.

- Attendance list: List of Punch-in/Punch-out or Leave status.
- Attendance summary

Message

This feature will facilitate the admin/manager to send messages/notifications to individual/ multiple or all users. The users will get these communications in their user App and will be able to revert to those messages.

- Send message to mobile application from Web backend
- Reply from mobile app to web dashboard

Branch Login

The Leads uploaded or added from the HO will be assigned automatically by the system based on region. These Leads will be visible to the branches in their login and can do further follow up and activities/actions.

- Branch User login: Login for the Branch user to start working on the leads received.
- Lead Actions/Activities which are given by marketing sales field force only.
- Branch cannot add any lead: Leads will be added by the HO only, no option for Branches to add the same.

Various Reports

Reports based on all activities and transactions on the system. Each report should be facilitated with filtration with different criteria, to ease the search and find task. The report section should have export to excel/csv format feature.

- Search & Filter facility
- Export to excel

Application Notifications & Alerts: On App & Web

The alerts and notifications from the system should effectively be intimated to the users. (Marketing officer) Mobile app & desktop.

Monitoring Dashboards

Should have user friendly dashboards for all users with a quick view that summarizes the activities carried on. The powerful dashboard can provide organized data in graphical representations based on different parameters. Each role/user should have dashboards with a summary of activity they are doing/assigned.

Geo Location

With the help of GPS, the system will be able to capture location of the user which will be used in the below activities:

- Morning Attendance marking with geo coordinates: Capturing the location of the user while they are punching-in.
- Meeting Punch in with geo coordinates: Captures the location of the user while they are punching-in at meeting/client visit.
- Location tracking in every 15 minutes of the on-duty staff: On every 15 minute the location of the users will be captured and pushed to the server to get a proper travel history of the user.

LIST OF ENCLOSURES TO BE ATTACHED WITH TECHNICAL BID APPLICATION

[Form-A]

[To be marked as enclosure No…]

SN	Description of the documents to be attached	To be with Annexure 1 marked as enclosure
1	Authorization letter (as per format of Annexure-A)	I
2	Bid submission letter (as per format of Annexure-B)	II
3	Certificate of Registration of Bidder/Firm	III
4	Documents related to constitution of Firm (Memorandum /Articles of Association/ Partnership Deed etc. Mentioned at SN-2 of Annexure 1)	IV
5	Address proof of Mumbai Office (latest landline MTNL/Electricity bill/Registration with Shop & establishment Dept./registered rent agreement/lease deed)	V
6	Photocopy of statutory registrations (mentioned at SN. 7 of proposal of Anx 1)	VI
7	Copy of Audited Balance sheet of Bidder/firm for last 3 years	VII
8	Auditor's Certificate regarding financials (as per format of Annexure-C)	VIII
9	Statement of accounts (stated at SN. 9 of Anx 1)	IX
10	Details /description of work sample (mentioned at SN-11 of Annx 1)	X
11	Photocopy of certificates etc. in support of Industry recognition/	XI
12	Awards/Accolades won during last 3 years (mentioned at SN.13 of Anx 1)	
13	Declaration by Bidder/Firm regarding overdue etc. (as per Annexure – D)	XII
14	Self-certified list of clients where Bidder / Firm is presently engaged mentioning period of engagement.	XIII
15	Self-certified list of clients acquired by Bidder/Firm during last 3 years	XIV
16	Organizational structure chart of the Bidder/Firm	XV
17	Status regarding litigations Bidder/Firm has (as per annexure –E)	XVI
18	Curriculum Vitae of core staff (as per annexure –F)	XVII
19	Photo copy of documents in support of professional qualification of core Staff	XVIII
20	Undertaking regarding applicability of restrictions on procurement (as per annexure – H)	XIX
21	Application money (Rs 5,000/- (Rupees Five Thousand Only)	XX
22	Earnest money deposit (EMD) - Rs 2,00,000/- (Rupees Two Lacs Only)	XXI
23	Bid Security Declaration Form (If applicable) Annexure I	XXII
Other enclosures (as per the documents mentioned in Annexure 1) attached by the bidder to be marked accordingly		

Annexure 1

PARTICULARS FOR SELECTION OF VENDOR - LEAD MANAGEMENT SYSTEM FOR MARKETING OFFICERS

TECHNICAL BID

(To be submitted by Vendors on their letter heads)

Chief Marketing Officer/DGM
16th Floor, Marketing Department
Chandermukhi Building
Central Bank of India
Nariman Point, Mumbai-400021

Dear Sir/Madam,

We hereby offer to submit our request for selection of vendor of the Central Bank of India as per RFP Notice no. CO/MKTG/2022-23/__ Dt __. __.2022 for "Selection of vendor - Lead Management System for Marketing Officers"**.** We unconditionally agree to abide by the Terms & Conditions specified therein.

As per the terms & conditions we have enclosed an Account Payee Demand Draft / Pay order of Rs.2,00,000/- (Rupees Two Lac Only) towards Earnest Money Deposit (EMD) & Rs 5,000/- (Rs Five thousand only) towards Non-Refundable Cost of application fees in favor of Central Bank of India payable at Mumbai.

Our brief profile is as under:

SN	Parameters	Particulars/Description			
1	Name & Address of the vendor/Firm (Details of Tel. Fax, Email)				
2	Constitution of the vendor/Firm (Proprietorship / Partnership / Joint venture or registered under Companies Act enclose necessary documentary proofs)				
3	Date of Establishment				
4	Financials of the vendor/firm for the last 3 years (Mention amount in crores Rs.)	Particulars	2017-18	2018-19	2019-20
		Turn over			
		Net profit			
		Net-worth			

5	Details regarding litigations vendor / Firm has	SN	Other party of litigation / Dept./court	Bidder/Firm status (Applicant /Respondent)	
		1			
		2			
		3			
6	Details of Statutory registrations of the vendor/Firm	SN	Registration for	Registration No	Date of Registration
		1	PAN		
		2	GST		
		3	RoC		
		4	Shop & Establishment		
		5	Other		
7	Name of Proprietor/Partners/ Directors of the vendor/Firm				
8	Details of 3 key functional personnel of the Bidder/Firm	Annexure F			
9	Present Banker of the vendor/Firm (Attach statement of each account for last 6 months)	S.N.	Name of the Bank	Branch and address	Account number
		1			
		2			
		3			
		4			
10	Employees Details		Employees	Nos	Work Exp
11	Details of work sample if any				

<table>
<tr><td>12</td><td>Organization chart
(Use separate sheet to create the chart)</td><td></td></tr>
<tr><td>13</td><td>Industry recognitions, awards and accolades won during last three years. (Attach copy of certificates as enclosure)</td><td></td></tr>
<tr><td>14</td><td>List of the existing clients (contact details will be used for checking references) Please Attached relevant Work Orders/PO/Letters or Email communication from clients confirming the same.</td><td><table>
<tr><th>SN</th><th>Name of client/firm</th><th>Name of contact person</th><th>Phone</th><th>engaged since</th></tr>
<tr><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td></tr>
</table></td></tr>
<tr><td>15</td><td>List of the clients acquired during last 3 years
(Contact details will be used for check references)
Please attached relevant Work Orders/PO/Letters or Email communication from clients confirming the same.</td><td><table>
<tr><th>SN</th><th>Name of client/firm</th><th>Name of contact person</th><th>Phone</th><th>engaged since</th></tr>
<tr><td></td><td></td><td></td><td></td><td></td></tr>
</table></td></tr>
<tr><td>16</td><td>List of the clients lost in last 3 years (contact details will be used for check references)</td><td><table>
<tr><th>SN</th><th>Name of client/firm</th><th>Name of contact person</th><th>Phone</th><th>engaged since</th></tr>
<tr><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td></tr>
</table></td></tr>
<tr><td>17</td><td>Details regarding litigations vendor / Firm has</td><td><table>
<tr><th>SN</th><th>Other party of litigation / Dept./court</th><th>Bidder/Firm status (Applicant /Respondent)</th></tr>
<tr><td>1</td><td></td><td></td></tr>
<tr><td>2</td><td></td><td></td></tr>
<tr><td>3</td><td></td><td></td></tr>
</table></td></tr>
<tr><td>18</td><td>Tools/Softwares used in day-to-day operations</td><td></td></tr>
<tr><td>19</td><td>If vendor/ Firm is maintaining own website, its URL</td><td></td></tr>
</table>

We certify that the above particulars are correct and we understand and agree that if any statement is found to be false or not correct, Central Bank of India reserves the right to remove as Selected vendor, if appointed, with immediate effect and Bank's authority in this regard shall full, final and binding on us. We understand and agree that the empanelment does not obligate Bank in any manner. We also understand that Central Bank of India has the right to cancel the name of the selected vendor from the approved lists at its absolute discretion at any time during the term of the engagement.

I/we certify that if appointed for selection, I/we shall appoint separate teams for any competing clients who are in the same business as Central Bank of India to avoid clash of interests and maintenance of confidentiality.

In case at any stage, it is found that that the information given by me/us is false/incorrect, Central Bank of India shall have the absolute right to take any action as deemed fit/ without any prior intimation to me/us.

(Signature of the Authorized person)____________________________________

Full name of the Authorized person: ____________________________________

Designation: ____

Seal of the firm and date

Annexure 2

PARTICULARS FOR SELECTION OF VENDOR - LEAD MANAGEMENT SYSTEM FOR MARKETING OFFICERS – COMMERCIAL BID

(To be submitted by firm on their letter heads)

Chief Marketing Officer/DGM
16th Floor, Marketing Department
Chandermukhi Building
Central Bank of India
Nariman Point, Mumbai-400021

Sir,

Reg: Bank's RFP for Selection of Vendor-Lead Management System for Marketing Officers.

RFP Ref: CO: MKTG:22-23: _____ dated ________ 2022

We give below our charges for the services to be rendered by us as per the scope of work given in the RFP.

	Bid in Rupees
Complete Charges for the services to be provided by the selected bidder (as mentioned in the Scope of work) for the period of one year.	In figures: Rs. ____________________________
	In Words: Rs __________________________ ____________________________________

Note: -
All applicable Taxes / Duties / levies and charges, should be included in the Bid.
Applicable taxes (TDS) would be deducted at source, if any, as per prevailing rates.
We declare that all the terms & conditions as per the RFP are agreeable to us.

Authorized Signatory

Name:

Designation:

Name of the firm/company/agency:

Address:

Place: Business Seal

Annexure - A

Authorization to sign documents
*Pertaining to bid submission against RFP No: ……………… for appointment of __________________ in Bank

[to be given on vendor/firm/company letter head]

It is certified that vendor/firm M/s……………………………………… having its registered office at…………………………………………… is submitting a bid proposal against RFP No for appointment of vendor in Central Bank of India.

In connection with the above Shri .... working with the company as… .... has been duly authorized to sign bid proposal documents or any other documents related to this bid submission.

The vendor/firm is liable of the consequences arising by the act of signing bid documents by Shri……………………………………

Signature :
Name of Signatory:
Designation :

Seal of Bidder/firm/company
Date :

Place :

*If vendor is a company, certified copy of the extract of Company's Board Resolution to this effect shall be require

Annexure – B

Bid Submission letter (on Firm's letter head)

Chief Marketing Officer/DGM
16th Floor, Marketing Department
Chandermukhi Building
Central Bank of India
Nariman Point, Mumbai-400021

Sir,

RFP NO: FOR SELECTION OF VENDOR -LMS FOR MARKETING OFFICERS.

We submit our Bid/Proposal herewith. In this connection, we understand that:

1. Bank is not bound to accept the lowest or any bid received by the Bank, and Bank may reject all or any bid without assigning any reason or giving any explanation what so ever.
2. Bank may follow close or open bidding process as per requirement of the Bank.
3. If our Bid is accepted, we undertake to enter into and execute at our cost, when called upon by the Bank to do so, a contract in the prescribed form.
4. If our Bid is accepted, we shall be jointly and severally responsible for the due performance of the contract
5. Selected bidder means the bidder who is decided and declared so after examination of commercial bids.
6. Bank can, on its sole discretion, conduct independent due diligence is respect of the information furnished in bid/proposal or any document(s) attached there to.
7. This bid/proposal comprises of total.................... pages, and …………………...enclosures marked as enclosure-1 to enclosure-….

Yours faithfully,

Signature with date:

Name of authorized signatory:

Seal of firm:

Annexure - C

[ON THE LETTER HEAD OF AUDITORS /CHARTERED ACCOUNTANTS]

CERTIFICATE

TO WHOM SO EVER IT MAY CONCERN

This is to certify that M/s.………………………………………………………………………. having its Registered Office……………………………………………………………………… had achieved the following level of Turnover/Net profits/ Net worth in respect for the financial years mentioned hereunder:

(Rs. In Crores)

Particulars	2019-20	2020-21	2021-22
Gross Annual Turn over			
Net profit			
Net-worth			

The figures certified for the stated Financial Years are based on the Books of Account, Audited Balance Sheet of the Company and the records produced before us.

Signatures of Auditors / Charted Accountants Name:

Seal

Place:

Date:

Annexure - D

(On the letterhead of the Firm duly stamped and signed)

DECLARATION-CUM-CERTIFICATE

TO WHOMSOEVER IT MAY CONCERN

This is certified that this firm has no over dues owing to any Firm/Central/State Government/Public Sector Undertakings/ Banks/RBI/IBA/any other Corporates/any regulatory authority or any other organization.

This is also certified that our firm has not been backlisted by any Central/State Government/Public Sector Undertakings/ Banks/RBI/IBA/any other Corporates/any regulatory authority.

Further, this is to certify that our firm does not have any legal, civil, criminal, taxation and other cases pending against, other than those mentioned in Annexure E attached to the bid/proposal, that may have an impact affecting or compromising the delivery of services required.

Signature of Authorized person:

Signed at______________________________dated_____________by_______________________

Designation______________________________for____________________________Firm
Seal of Selected vendor

Annexure – E

(On the letterhead of the Firm duly stamped and signed)

STATUS OF LITIGATIONS PENDING PERTAINING TO THE BIDDER

SN	Other party to litigation	Case no	Status of bidder in litigation (Applicant / Respondent)	Briefs of litigation
1				
2				
3				
4				

Signature of Authorized person:

Sign___________________________________dated_____________by________________________

Designation___________________for_____________________Firm

Seal of Firm

Annexure - F

CURRICULUM VITAE (CV) OF PROFESSIONAL STAFF TO BE ENGAGED WITH Central Bank of India

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

2. Name of Staff [Insert full name]:

3. Proposed Position:

4. Nationality:

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

6. Membership of Professional Associations:

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

8. Languages [For each language indicate proficiency: good, fair, or poor in speaking, reading, and writing]:
9. Employment Record [Starting with present position, list in reverse order every employment held by staff member since graduation, giving for each employment see format here below: dates of employment, name of employing organization, positions held.]:

From [Year]: To [Year]:

Employer:

Positions held:

10. Detailed Tasks Assigned

11. Work Undertaken that Best Illustrates capability to Handle Tasks Assigned

a) List all tasks to be performed under this assignment

b) Among the assignments in which the staffs have been involved, indicate the following information for those assignments that best illustrate staff capability to handle the tasks listed under point10.]

(i) Name of assignment or project:

(ii) Year:

(iii) Location:

(iv) Client:

(v) Main project features:

(vi) Positions held:

(vii) Activities performed:

Note:

(Use separate sheets for different projects. Please provide at least 3 such client references)

(Signature of Authorized Signatory) Name
of the Authorized Signatory: Firm Name:

Annexure - G

(On the letterhead of the Firm duly stamped and signed)

Format for seeking clarification /Pre-bid queries (in word document only)

	Page No.	Clause	Query
1			
2			
3			

Signature of Authorized person:

Signed at_______________________________dated_____________by________________________

Designation_______________________________for______Firm Seal of Firm

Annexure - H

Declaration/ undertaking from bidder regarding applicability of restrictions on procurement from a bidder of a country which shares a land border with India as per the order no. 6/18/2019-PPD dated 23rd July 2020 issued by Ministry of finance department of expenditure

(This letter should be on the letterhead of the Bidder duly signed by an authorized signatory)

Chief Marketing Officer/DGM
Marketing Department
16th Floor, Central Bank of India
Chandermukhi Building
Nariman Point, Mumbai-400021

We, M/s ------------- are a private/public limited company/LLP/Firm *<strike off whichever is not applicable>* incorporated under the provisions of the Companies Act, 1956/2013 Limited Liability Partnership Act 2008/ Indian Partnership Act 1932, having our registered office at ------------------------ ---------------------- (referred to as the "Bidder") are desirous of participating in the RFP Process in response to your captioned RFP and in this connection, we hereby declare, confirm and agree as under:

We, the Bidder have read and understood the contents of the RFP and Office Memorandum & the Order (Public Procurement No.1) both bearing no. F.No.6/18/2019/PPD of 23rd July 2020 issued by Ministry of Finance, Government of India on insertion of Rule 144 (xi) in the General Financial Rules (GFRs) 2017 and the amendments & clarifications thereto, regarding restrictions on availing/procurement of goods and services, of any Bidder from a country which shares a land border with India and / or sub-contracting to contractors from such countries.

In terms of the above and after having gone through the said amendments including in particular the words defined therein (which shall have the same meaning for the purpose of this Declaration cum Undertaking), we the Bidder hereby declare and confirm that:

Please strike off whichever is not applicable

1. "I/ we have read the clause regarding restrictions on procurement from a bidder of a country which shares a land border with India; I/ we certify that______________________________is not from such a country."

2. "I/ we have read the clause regarding restrictions on procurement from a bidder of a country which shares a land border with India; I/ we certify that is from such a country. I hereby certify that____fulfills all requirements in this regard and is eligible to be considered. [Valid registration by the Competent Authority is attached.]"

Further In case the work awarded to us, I/ we undertake that I/ we shall not subcontract any of assigned work under this engagement without the prior permission of bank.
Further we undertake that I/we have read the clause regarding restrictions on procurement from a bidder of a country which shares a land border with India and on sub-contracting to contractors from such countries; I certify that our subcontractor is not from such a country or, if from such a country, has been registered with the Competent Authority and will not sub-contract any work to a contractor from such countries unless such contractor is registered with the Competent Authority. I hereby certify that our subcontractor fulfills all requirements in this regard and is eligible to be considered. [Valid registration by the Competent Authority is attached herewith.]"

2. We, hereby confirm that we fulfil all the eligibility criteria as per the office memorandum/ order mentioned above and RFP and we are eligible to participate in the RFP process. We also agree and accept that if our declaration and confirmation is found to be false at any point of time including after awarding the contract, Bank shall be within its right to forthwith terminate the contract/ bid without notice to us and initiate such action including legal action in accordance with law. Bank shall also be within its right to forfeit the security deposits/ earnest money provided by us and also recover from us the loss and damages sustained by the Bank on account of the above.

3. This declaration cum undertaking is executed by us through our Authorized signatory/ies after. having read and understood the Office Memorandum and Order including the words defined in the said order.

Dated this…………………………………..by.. 20

Yours faithfully,

Authorized Signatory
Name:
Designation:
Firm/bidder's Corporate Name
Address
Email and Phone #

List of documents enclosed:

1. Copy of certificate of valid registration with the Competent Authority (strike off if not applicable)
2. ……….
3. ……….
4. ……….

Central Bank of India

<u>Annexure - I</u>

BID SECURITY DECLARATION FORM

Date: **RFP No:**

To,

1. I/We, the undersigned, declare that M/s. is a Micro and Small Enterprise and the copy of registration certificate issued by NSIC/DIPP for Micro and Small Enterprises (MSE) / Startups which are valid on last date of submission of the RFP documents are enclosed.

2. I/We understand that, according to your conditions, bids must be supported by a Bid Securing Declaration as per Rule 170 of General Financial Rules (GFRS)2017 by Micro and Small Enterprises (MSES).

OR

2A. As per the RFP / RFP no... floated for........ at para no:.......... a Bid Declaration Form In lieu of Bid Security is required to be submitted by me/ as per Rule 170 of General Financial Rules (GFRS)2017 by Micro and Small Enterprises (MSES).

3. I/We accept that I/We may be disqualified from bidding for any contract with you for a period of 1 year from the date of notification if we are in a breach of any obligation under the bid conditions, because I/We

a) have withdrawn/modified/amended, impairs or derogates from the RFP, my/our Bid during the period of bid validity specified in the form of Bid; or

b) having been notified of the acceptance of our Bid by the purchaser during the period of bid validity (i) fail or reuse to execute the contract, if required, or (ii) fail or refuse to furnish the Performance Security, in accordance with the Instructions to Bidders.

4. I/We understand this Bid Securing Declaration shall cease to be valid if I am/we are not the successful Bidder, upon the earlier of (i) the receipt of your notification of the name of the successful Bidder, or (ii) thirty days after the expiration of the validity of my/our Bid.

5. I/We declare that am the authorized person of declaration for and on behalf of Letter of Authority for executing to make the declaration is enclosed.

Signed:

In the capacity of Name:

Duly authorized to sign the bid for an on behalf of (insert complete name of Bidder)

Dated on day of

Corporate Seal (where appropriate)

(Note in case of a Joint Venture, the Bid Securing Declaration must be in the name of all partners to the Joint Venture that submits the Bid)

End of Document