



Request for Proposal (RFP) for
Cloud Contact Software Solution

RFP Reference Number:
IT-02/2022-23 Date: 14.Jul.2022

Email: prit@stockholding.com

DISCLAIMER

The information contained in this Request for Proposal (RFP) document or information provided subsequently to bidder(s) or applicants whether verbally or in documentary form by or on behalf of Stock Holding Corporation of India Limited (*Stock Holding*), is provided to the bidder(s) on the terms and conditions set out in this RFP document and all other terms and conditions subject to which such information is provided

This RFP document is not an agreement and is not an offer or invitation by *Stock Holding* to any parties other than the applicants who are qualified to submit the bids (“bidders”). The purpose of this RFP is to provide the bidder(s) within formation to assist the formulation of their proposals. This RFP does not claim to contain all the information each bidder may require. Each bidder should conduct its own investigations and analysis and should check the accuracy, reliability and completeness of the information in this RFP and where necessary obtain independent advice. *Stock Holding* makes no representation or warranty and shall incur no liability under any law, statute, rules or regulations as to the accuracy, reliability or completeness of this RFP. *Stock Holding* may in its absolute discretion, but without being under any obligation to do so, update, amend or supplement the information in this RFP

RFP Document Details

Name of Organisation	Stock Holding Corporation of India Limited
RFP Reference No.	IT-02/2022-23
Requirement	Request for proposal (RFP) for selection of authorized vendors/OEM's for Contact Centre Solution
Delivery & Installation Address	Stock Holding Corporation of India Limited, SHCIL House, Plot No.P-51, TTC Industrial Area, MIDC, Mahape, Navi Mumbai 400710 Maharashtra
Date of issue of RFP document	14-Jul-2022
Interest free Earnest Money Deposit (EMD)	Rs.2,00,000/- (Indian Rupees Two Lakh Only) by way of RTGS/NEFT to be paid to Stock Holding Corporation of India Limited as Earnest Money Deposit should be submitted separately before submission of online bids by way of RTGS/NEFT on/or before 08-Aug-2022 StockHolding's Bank Account No.: 004103000033442 Bank: IDBI Bank (Nariman Point Branch) IFSC: IBKL0000004 bidders with MSME certificate are exempted for providing EMD. Please share the UTR details to us on below mentioned email address.
Last date for submission of bidder queries (by email)	21-Jul-2022
Date, Time and place for online Pre- bid meeting	Pre-bid meeting (Online) at 22-Jul-2022@11:30 Hrs. To participate, please send your request to prit@stockholding.com on or before 21-Jul-2022, @ 14:00 Hrs
Last Date for Submission of Online Bid (Technical and Commercial Price) bids	08-Aug-2022 by (18:00 Hrs)
Date of opening online Technical bid	10-Aug-2022 @ (12:00 Hrs)
Date of opening of online Commercial bid	23-Aug-2022 @ (12:00 Hrs). To participate, please send your request to prit@stockholding.com on or before 22-Aug-2022, @ 14:00 Hrs
Address for online submission of bids	Bid must be submitted online on https://stockholding.auctiontiger.net
Email Address	PRIT@stockholding.com
Contact Details of M/s e- Procurement Technologies Ltd.(ETL), Ahmedabad	Call : +91 9904406300 +91 9510812960 +91 9265562821 +916354919566 e-mail: support@auctiontiger.net
This bid document is not transferable	

StockHolding reserves the right to modify/update activities/ dates as per requirements of the process.

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1. OVERVIEW – ABOUT STOCKHOLDING CORPORATION OF INDIA LIMITED

StockHolding, a subsidiary of IFCI Limited was promoted by the public financial institutions and incorporated as a public limited company on July 28, 1986. StockHolding is a Government Organization, being a subsidiary of IFCI. StockHolding, one of the largest Depository Participants (DP) and also largest premier Custodian in terms of assets under custody, provides post trading and custodial services to institutional investors, mutual funds, banks, insurance companies, etc. StockHolding acts as a Central Record Keeping Agency (CRA) for collection of stamp duty in 21 States and Union Territories on pan India basis. StockHolding is one of the largest Professional Clearing Members of the country.

In Retail segment besides DP services, StockHolding offers stock broking services through its wholly owned subsidiary SHCIL Services Ltd. (SSL). StockHolding is also into distribution of various investment and retirement solutions viz. Fixed Deposits, Bonds & NCDs of reputed institutes and corporates, Mutual Fund Schemes, Initial Public Offers (IPOs) and National Pension System (NPS). RBI has designated StockHolding as one of the Agency Banks to distribute GoI Bonds in dematerialized form. StockHolding also offers the Government of India Sovereign Gold Bonds. StockHolding is a corporate agent registered with IRDAI for distribution of insurance (Life, Health & General) products.

StockHolding has its registered office at Mumbai, main operations office at Navi Mumbai and operates through its over 200 retail branches all over India.

2. SUBMISSION OF PROPOSAL

The response to this RFP will be submitted by way of two stage bidding process. The technical and commercial proposal with the relevant information/documents/acceptance of all terms and conditions as described in this RFP document will be submitted online through M/s e-Procurement Technologies Ltd.(ETL), Ahmedabad, the outsourcing agency approved by Stock Holding Corporation of India Ltd (*StockHolding*) for e-bidding on the website (<https://stockholding.auctiontiger.net>).

The bidders will have to upload the duly signed and scanned RFP submission relevant document(s) as part of technical bid. All Annexure Forms will have to be filled and submitted online. The Technical Bid with relative documents must be submitted online.

The bidders are requested to note that they cannot make their online submission after the time stipulated above and no extension of time will normally be permitted for submission of bid.

The bidders are requested to note that it is mandatory to have a valid digital certificate issued by any of the valid certifying authority approved by Govt. of India to participate in the online bidding. The bidders are requested to ensure that they have the same, well in advance or if any assistance is required for the purpose, bidders can contact service provider (M/s e-Procurement Technologies Ltd.).

Minimum requirement for e-Bidding:

1. Computer / Laptop (Notebook) with internet connection
2. Operating system - Windows XP Service pack -3 / VISTA/ Windows 7 or above
3. Digital certificate - Class II or III, Signing + Encryption. Please note that this must be a signing AND encryption certificate.

2.1 INVITATION OF BIDS

The purpose of this RFP is to inform potential Bidders of a business opportunity and to solicit proposals for Contact Centre Solution, as currently contemplated by Stockholding. Based upon the review and evaluation of proposals offered in response to this RFP, Stockholding may at its sole discretion negotiate and enter into contracts with successful Bidders. Notwithstanding any other provision herein, Bidder participation in this process is voluntary and at Bidder's sole discretion. Price will be a consideration but will not be the sole factor in Stockholding's decision to award a contractual relationship. The products, volumes and historical numbers that are provided from Stockholding during this process are to be used and interpreted solely as a guide and are intended to provide guidance to Stockholding's future or projected requirements but are not a guarantee, contract or commitment to any current or future volume or orders. No volume commitment should be inferred from this process or from any of the documentation provided by Stockholding. Stockholding reserves the right to accept or reject any or all bids from a specific or multiple Bidders for any reason at any time. Stockholding also reserves the right at its sole discretion to select or reject any or all Bidder(s) in this process and will not be responsible for any direct or indirect costs incurred by the Bidders in this process.

2.2 DUE DELIGENCE

The bidder is expected to examine all instructions, Forms, Terms, Conditions and Specifications in this RFP. Bids shall be deemed to have been made after careful study and examination of this RFP with full understanding of its Implications. The Bid should be precise, complete with all details required as per this RFP document. Failure to furnish all information required by this RFP or submission of Bid not as per RFP requirements will be at the bidder's risk and may result in rejection of the bid and the decision of StockHolding in this regard will be final and conclusive and binding.

2.3 COMMUNICATION CHANNELS FOR RFP ENQUIRIES AND CLARIFICATIONS

All communications related to this RFP should be directed by email, physical communication to the following:

Procurement Team
Email: PRIT@stockholding.com

If StockHolding, in its absolute discretion, deems that the originator of the question will gain an advantage by a response to a question, then StockHolding reserves the right to communicate such response to all the bid respondents.

2.4 COST OF BIDDING

The bidder shall bear all costs associated with the preparation & submission of its bid and *StockHolding* will in no case be held responsible or liable for these costs, regardless of the conduct or outcome of the bidding process

2.5 CONTENTS OF THIS RFP DOCUMENT

The requirements, bidding procedure, general terms & conditions are prescribed in this RFP document with various sections:

1. Annexure – I – BID FORM AND LETTER OF ACCEPTANCE
2. Annexure – II – BIDDER PROFILE
3. Annexure – III – ELIGIBILITY CRITERIA
4. Annexure – IV – TECHNICAL BID FORMAT
5. Annexure – V – COMMERCIAL BID FORMAT
6. Annexure – VI – COVERING LETTER
7. Annexure – VII – DECLARATION
8. Annexure – VIII – COMPLIANCE STATEMENT
9. Annexure – IX – STATEMENT OF DEVIATION
10. Annexure – X – PRE BID QUERY FORMAT
11. Annexure – XI – DRAFT NDA

2.6 CLARIFICATIONS REGARDING RFP DOCUMENT

1. Before bidding, the bidders are requested to carefully examine the RFP Document and the Terms and Conditions specified therein, and if there appears to be any ambiguity, contradictions, gap(s) and/or discrepancy in the RFP Document, they should forthwith refer the matter to StockHolding for necessary clarifications.
2. A bidder requiring any clarification for their queries on this RFP may be obtained via email to PRIT@stockholding.com
3. StockHolding shall not be responsible for any external agency delays.
4. StockHolding reserves the sole right for carrying out any amendments / modifications / changes in the bidding process including any addendum to this entire RFP
5. At any time before the deadline for submission of bids / offers, StockHolding may, for any reason whatsoever, whether at its own initiative or in response to a clarification requested by bidders, modify this RFP Document.
6. It may be noted that notice regarding corrigendum/addendums/amendments/response to bidders' queries, etc., will be published on StockHolding's website only. Prospective bidders shall regularly visit StockHolding's same website for any changes/development in relation to this RFP.
7. StockHolding reserves the rights to extend the deadline for the submission of bids, if required. However, no request from the bidders for extending the deadline for submission of bids, shall be

- binding on StockHolding.
8. StockHolding reserves the right to reject any or all the responses to RFPs / Bids received in response to this RFP at any stage without assigning any reason whatsoever and without being liable for any loss/injury that Bidder might suffer due to such reason. The decision of StockHolding shall be final, conclusive and binding on all the parties directly or indirectly connected with the bidding process.

2.7 VALIDITY OF OFFER

The offer should remain valid for a period of at least **90 days** from the date of submission of bid.

2.8 DEVIATION

StockHolding may at its sole discretion accept or reject all or any of the deviations, however it may be noted that the acceptance or rejection of any deviation by StockHolding will not entitle the bidder to submit commercial bid. In case of any divergence in the stand taken by StockHolding and the bidder on any specific deviation, StockHolding reserves the right to not accept the deviation and disqualify the bidder in the technical evaluation process and the commercial bid in such cases shall not be opened.

3. ELIGIBILITY CRITERIA

For this RFP, either the OEM's authorized partner on behalf of the Principal / OEM or Principal / OEM itself can bid but both cannot bid simultaneously.

If OEM's authorized partner submits bid on behalf of the principal /OEM, the same partner shall not submit a bid on behalf of another principal /OEM for this RFP.

S/n	Criteria	Documents to be submitted by bidder
1	Bidder/OEM should be a company registered under the provisions of the Indian Companies Act, 1956/2013 or a partnership firm registered under the Indian Partnership Act, 1936 or the Limited Liability Partnerships Act, 2008. Bidder should be registered with the Tax Authorities	<ul style="list-style-type: none"> For Companies with Indian origin certificate of Incorporation / Registration under Companies Act, 1956/2013. Memorandum and Articles of Association PAN and GST Registration Certificates (GSTIN)
2	Bidder/OEM should not be under a declaration of ineligibility for corrupt, fraudulent or any other unethical business practices and should not be debarred or blacklisted by any State Government / Central Government / PSU for any reason, during previous 5 years from the date of submission of bid.	A self-declaration by authorized signatory on Company letter head
3	The Bidder/OEM must have an average turnover of minimum Rs. 8 crore (Rupees Eight crore) during last 03 (three) financial year(s) i.e. FY 2021-22, FY 2020-21 and FY 2019-20.	Copy of the audited financial statement for required financial years.
4	The Bidder/OEM should be profitable organization on the basis of profit before tax (PBT) for at least 02 (two) out of last 03 (three) financial years	Copy of the audited financial statement along with profit and loss statement for corresponding years and / or Certificate of the statutory auditor.
5	Bidder/OEM should have experience of providing and implementing at least 5 (Five) projects/solution of Contact Centre, 3 (Three) with same OEM, 3 (Three) out of 5 (Five) should be in BFSI sector	Copy of the order and/or Certificate of completion of the work. The Bidder should also furnish user acceptance report.
6	Client references and contact details (email/ landline/ mobile) of customers for whom the Bidder/OEM has executed similar projects in India. (Start and End Date of the Project to be mentioned) in the past (At least 5 (five) client references are required) out of which at least 3 (Three) should be in BFSI Sector.	Bidder should specifically confirm on their letter head in this regard as per Annexure - II
7	Certification Requirements : Bidder/OEM should have any valid Security Certification	Copy of the Valid Certificate(s) to be provided
8	Bidder, if participating as Channel Partner of any OEM, then OEM should have a support center and level 3 escalation located in India. For OEMs, directly participating, the conditions mentioned above for support center remain applicable.	Self-declaration required on Company letter head duly signed by authorized signatory

9	Bidder/OEM should have at least 1500 (One thousand five hundred) current Number of seats (active licenses) supported through technology solutions for Contact Center Processes overall in India.	Certificate from the referenced client on the Client’s letterhead certifying the fulfillment of the criteria.
10	Bidder to be certified channel partner of the OEM. For OEMs, directly participating, the condition is not applicable.	MAF from OEM is required. If OEM directly participating, self-Certification is required on Company letter head duly signed by authorized signatory
11	Bidder/OEM need to certify that they have read the clauses contained in O.M. No. 6/18/2019-PPD, dated 23.07.2020 order (Public Procurement No. 1), order (Public Procurement No. 2) dated 23.07.2020 and order (Public Procurement No. 3) dated 24.07.2020 regarding restrictions on procurement from a bidder of a country which shares a land border with India. Bidder also to certify that bidder and OEM are not from such a country or if from a country, has been registered with competent authority.	Self-declaration required on Company letter head
12	Bidder/OEM to abide by labor laws, human rights and regulations in their regions of business. Bidder to adhere to laws addressing child, forced or trafficked labor	Self-declaration from bidder on their letter head duly signed by authorized signatory
13	Bidder / OEM shall provide the required solution to be hosted in India Data Centre.	Certification from Cloud Service Provider providing relevant servers hosting the platform is present in India. Self-Certification from OEM ensuring that the platform is hosted on the same servers.

Important Bidder should submit all supporting documents at the time of submitting technical bid, duly signed and stamped on their company’s letter head.

4. BID PREPARATION AND SUBMISSION

A. TECHNICAL BIDS

1. The bidder will submit the Technical Bid online on <https://stockholding.auctiontiger.net> and should be as per the format given.
2. There should not be any hidden / conditional costs in the bids and in the event of their presence in the bid, the bid is liable to be rejected
3. No indications pertaining to price or commercial terms should be made in the Technical Bid submission. If any price indications are made, then the bids may be rejected
4. No open ended / conditional bid shall be entertained and are liable for rejection

B. COMMERCIAL BIDS

1. The bidder will submit Commercial Bid online on <https://stockholding.auctiontiger.net> as per the format given in the Commercial Bid Format - refer **Annexure-V**.

C. SUBMISSION OF BIDS

1. The required documents for Eligibility Criteria and Technical Bid, Commercial Bid must be submitted (uploaded) online on <https://stockholding.auctiontiger.net>. Technical Bid and Commercial Bid should be complete in all respects and contain all information asked for in this RFP document
2. The offer should be valid for a period of at least **90 days** from the date of submission of bid
3. The bidder shall fulfil all statutory requirements as described by the law and Government notices. The bidder shall be solely responsible for any failure to fulfil the statutory obligations and shall indemnify Stock Holding against all such liabilities, which are likely to arise out of the agency's failure to fulfil such statutory obligations
4. The bidder shall be solely responsible either for any injury, damage, accident to the workman employed by the bidder for any loss or damage to the equipment / property in the areas of work as a result of negligence / carelessness of its deployed resources.
5. No request for any further extension of the above deadline shall be entertained. Delayed and/or incomplete bid shall not be considered.
6. All employees engaged by the bidder shall be comprehensively insured for accidents and injuries by the bidder at his/her/their cost
7. Bidders are advised to submit their online Commercial bid well before last date of submission.
8. There will be no extension(s) to the last date of online submission of Technical and Commercial bids.
9. A Draft NDA is enclosed with this RFP. Acceptance of all clauses mentioned in the NDA (Draft) need to be provided by the bidders along with the Technical Bid.

5. BID EVALUATION

StockHolding will evaluate the bid submitted by the bidders under this RFP. It is StockHolding's discretion to decide at the relevant point of time. The eligibility bid submitted by the bidder will be evaluated against the Eligibility criteria set forth in the RFP. The bidder needs to comply with all the eligibility criteria mentioned in the RFP to be evaluated for evaluation. Non-compliance to any of the mentioned criteria would result in outright rejection of the bidder's proposal. The decision of StockHolding would be final and binding on all the bidders to this document. StockHolding may accept or reject an offer without assigning any reason whatsoever. The bidder is required to comply with the requirement mentioned in the RFP. Non-compliance to this may lead to disqualification of a bidder, which would be at the discretion of StockHolding.

Responses from Respondent will be evaluated on four stages, sequentially, as below –

- Stage A – Evaluation of Eligibility as mentioned in Annexure III
- Stage B – Technical Evaluation consisting of Document Evaluation
- Stage C – Commercial Evaluation
- Stage D – Techno Commercial Evaluation

Only **Stage A** evaluation shall be done on knock-out basis. This implies that those respondents qualifying in Stage A will only be considered for further stages.

The final evaluation will be made on the basis of quality-cum-cost based selection (**QCBS**), with a weightage to quality of services and cost in the ratio of **70:30**. During evaluation of the RFP, StockHolding, at its discretion, may ask the Bidder for clarification in respect of its tender. The request for clarification and the response shall be in writing, and no change in the substance of the tender shall be sought, offered, or permitted. StockHolding reserves the right to accept or reject any tender in whole or in parts without assigning any reason thereof. The decision of the StockHolding shall be final and binding on all the vendors to this document and StockHolding will not entertain any correspondence in this regard. The evaluation methodology vis-à-vis the weight-ages are as under:

Stage A – Eligibility Criteria

Responses to the Eligibility Criteria as mentioned in **Annexure - III** shall be evaluated and assessed. All requirements as mentioned in the Eligibility Criteria are Mandatory, post verification the vendor will be selected for all subsequent stages

Stage B – Technical Scoring

StockHolding will allot score to the above evaluation criteria individually. The aggregation of the scores as mentioned in the below table will be termed as “Aggregate Technical Score (ATS)” and will be used for further evaluation. The template for “**Stage – B** Technical Evaluation” is as per the Annexure IV. Those Respondents who meet a minimum score of 70% under “Aggregate Technical Score” will be considered as “Qualified under **Stage B**” and will be considered for evaluation under Stage C. In case there is only one vendor having technical score of 70 or more, the StockHolding may, at its sole discretion, also consider the next highest technical score and qualify such vendor. In case none of the participant bidders scores more than 70% marks or more in the technical evaluation, the commercial bid of top 2 bidders may be opened at

the sole discretion of the StockHolding. The “Aggregate Technical Score” secured by the Respondents will be used in the **Stage C – Commercial Evaluation**.

Sr. No.	Parameter	Performance Level	Score	Documentation/ method	Evaluation
1	SI/OEM - current Number of licenses/seats supported through technology solutions for Contact Center Processes (overall in India)	=>5000	25	Copy of the order and / or Certificate of completion of the work. The Bidder should also furnish user acceptance report. Or Experience Certificate.	
		=>3000 to < 5000	20		
		=>1500 to < 3000	10		
		<1500	0		
2	# of MUST HAVE Features present in proposed solution	>95%	100	As mentioned in the Mandatory Requirements of Section 6.1.2 of the RFP	
		86-95%	80		
		70-85%	60		
		50-69%	30		
		<50%	0		
3	# of Good To Have Features present in proposed solution	100%	25	As mentioned in the Mandatory Requirements of Section 6.1.2 of the RFP	
		80-99%	20		
		50-79%	10		
		<50%	0		
	Max Score Possible:		150		

Maximum eligible score would be 150 that would be converted into 100. This score would be known as Aggregate Technical Score (ATS). Example: If a vendor scores 125 and the highest score is 150 then the ATS will be calculated as $125/150 * 100 = 83.33$

Stage C – Commercial Evaluation

Commercial proposal should be uploaded on e-procurement system against, which should give all the relevant price information. No information should be kept blank. Offer should be in strict conformity with the format and conditions as given in Annexure – V.

The commercial proposals of short listed bidders shall then be opened and evaluated for completeness. If the commercial quote is incomplete either for not providing quote for all required services, it shall be presumed that the services shall be provided without any additional cost to the StockHolding. StockHolding may, however, in its absolute discretion disqualify a bidder whose commercial quote is found to be incomplete. If it is found at any stage (before or after selection) that there is a calculation (addition, subtraction, multiplication or division) mistake, then the final totaled price, notwithstanding the mistake, shall be considered as the offer price for evaluation. However, the price payable shall be the lower of the “correct total” and “incorrect total”.

Example A, if the price quoted is as under:

Service A: Rs.400/-

Service B: Rs.599/-

Service C: Rs.2350/-

Total: Rs.4939/-

In this example, Rs.4939/- shall be taken for evaluation. However, the price payable shall be Rs.3349/-

Example B, if the price quoted is as under:

Service A: Rs.400/-
 Service B: Rs.599/-
 Service C: Rs.2350/-
 Total: Rs2939/-

In this example, the price taken for evaluation shall be Rs.2939/- Though the correct total is 3349, the price payable shall be Rs.2939/- only.

Stage D: Procedure for Techno Commercial Evaluation

The Evaluation will be done on a 70:30 weightage for Technical (70%) and Commercial (30%) respectively.

On the basis of the combined weighted score for technical and commercial evaluation, the bidders shall be ranked in terms of the total score obtained.

The proposal obtaining the highest total combined score in evaluation of quality and cost will be ranked as H-1 followed by the proposals securing lesser marks as H-2, H-3 etc. The proposal securing the highest combined marks and ranked H-1 shall be recommended for award of contract.

As an example, the following procedure can be followed: A score (S) will be calculated for all qualified bidders using the following formula:

$$\frac{C_{LOW}100X + T (1-X)}{C}$$

C stands for cost arrived basis of commercial evaluation

CLOW stands for the lowest cost arrived basis of commercial evaluation.

T stands for technical evaluation score and

X is equal to 0.30

Sr. No.	Bidder	TS = Technical Evaluation Marks	C = Cost	A = TS* 0.70	B = [(C _{LOW} / C) x 100] x 0.30	Score S = A+B	Ranking
1	Vendor A	150	125	105	24	129	H1
2	Vendor B	125	112.5	87.5	26.67	114.17	H2
3	Vendor C	100	100	70	30	100	H3

- In the above example, C_{LOW} is 100.
- In the above example, A, with the highest score becomes the successful bidder.
- In case of more than one Bidder with equal highest score (S) up to three decimal, then number of decimal will be increased.
- The technical evaluation and the commercial evaluation shall have the weightage of 70% and 30% respectively and this weightage shall be considered for arriving at the successful bidder.
- The decision of the StockHolding shall be final and binding on all the vendors to this document. StockHolding reserves the right to accept or reject an offer without assigning any reason whatsoever.

Price Negotiation:

StockHolding shall reserve the right to negotiate with the Bidder(s) whose proposal has been ranked best in terms of the composite score evaluation for the proposed Project under the following conditions:

- a) In case of tied composite scores between more than one bidder, the bidder securing the highest score in the Technical evaluation shall be considered.
- b) In case the bidder securing the highest score in the Technical evaluation is not in a position to accept and execute the contract, the Purchaser may negotiate with the bidder securing the next highest Technical Score.
- c) On this basis, the final contract agreement would be firmed up for award & signing.

6. SCOPE OF SERVICES

Buyer Profile	StockHolding Corporation of India Limited. (StockHolding), is a subsidiary of IFCI Limited and promoted by the public financial institutions and incorporated as a public limited company on July 28, 1986. StockHolding is a Government Organization, being a subsidiary of IFCI
Services up for Quote	Empanelment of authorized vendors/OEM’s for Contact Centre Solution
Scope of Services	Detailed scope mentioned in Section 5.1
Operating Days & Hours	24x7
Selection Process of vendors	<ul style="list-style-type: none"> You need to sign and send your Process Compliance and Techno-Commercial statement in response to this RFP (Annexure I, II, III & IV) along with RFP document You need to submit the quote as per the format mentioned in Annexure V StockHolding will evaluate the final quotes of all the vendors & will decide on awarding business based on the Comprehensive value proposition of each service provider.
Award Decision	<ul style="list-style-type: none"> Supplier must submit the quote by the due date in order to be considered for the contract. StockHolding will decide which vendor will be examined for awards. It is important to note that the lowest price supplier does not automatically win the business. The contract will be awarded basis the criteria set by StockHolding which comprise Technical Evaluation, and Commercial Evaluation. <p>The supplier selected for award of the contract, on refusal to accept the contract would be debarred from further dealings with StockHolding.</p>
Service & Penalty	As mentioned in the Section 8 of the RFP

6.1 SCOPE OF SERVICES

6.1.1. MANDATORY REQUIREMENTS

Sr. No.	Requirement Description
MAN - 1	The Dialer system should be a Cloud based enterprise IP telephony call-processing solution that is scalable, distributable and highly available. It should be capable of deployment in Private Cloud or Hosted (Public Cloud). The solution should seamlessly integrate with 3rd party applications and business tools to fetch data and insights for Call Centre agents to deliver efficient performance. The Platform cloud infrastructure should be hosted in India. The platform should be provided on a CCAS (Contact Centre as a service) / SAS Model.
MAN - 2	All URL links used within the Dialer and in interfacing or integrating to back end systems should be secured and encrypted in the Dialer System and all other applications.
MAN - 3	Any/All e-mail subsystems integrated with the Dialer platform should support and use only secured ports for communication between Dialer Platform Providers and StockHolding data centre.

MAN - 4	Every aspect of each customer interaction must be logged and time stamped in IST for each event/activity from Dial Out to completion. e.g. Right from the time the call is dialled to Agent Campaign and to agents, to disposition/wrap-up etc. should be available. All CDR's should be within India at all times.
MAN - 5	<p>Voice logger system recording methods should support the following (but not limited to)</p> <ul style="list-style-type: none"> • Selective • Agent Initiated • Single Channel Based recording • Recordings at Source should be encrypted as the Voice Logger OEM standards. • The Recorded calls should be available in mp3 format. for Bulk Exports through API/other methodologies incase required • Sampling rate of recordings at source should be a minimum of 16k • Call Logger should support PII Masking and/or Redaction capabilities • Call Logger should support real time hours remote storage replication support
MAN - 6	The voice logging system should be able to record all interactions by customer, even if the call is transferred to other agents. The voice logging system should be able to tag a unique call id through which all voice recording for the same call can be tracked.
MAN - 7	The proposed architecture should be compliant to all statutory laws / Rules & Regulation of India including all necessary licenses to operate Dialer Platform Services for STOCKHOLDING domestic outbound/inbound process.
MAN - 8	The system should be able to integrate and connect to different technology & tools within the Contact Centre and with STOCKHOLDING systems i.e. CRM, TCS BANCS Trader Terminal, SMS Gateway
MAN - 9	<p>The following key parameters should be made available accurately and should be traceable:</p> <ul style="list-style-type: none"> • Connect minutes of those in outbound/inbound agent process including agent talk time, and wrap up time and hold time for each call. • Connect minutes of those calls in inbound/outbound IVR and that are completed in inbound/outbound IVR. • All other connect minutes not included in the points, will be reported separately with segment wise information. (e.g. Connect minutes due to short calls in Dialer, Connect minutes due to wait time in Dialer etc.).
MAN - 10	The Dialer Platform will have to provide a web based portal for providing real-time and historical reports that can be accessed by STOCKHOLDING. These reports should be optimized and available on all platform formats like PC/Mac/Tablets/Mobile Devices etc. Dashboards providing real-time quality analytic insights regarding Agent's performance and metrics for Supervisor's to take informed decisions on resource allocation and to improve performance. To be provided in line with all reports required in MIS section. Additional MIS requirements also to be in line with proposed.
MAN - 11	Dialer should be able to access information via XML/SOAP/HTTPS/Web-services/API's/terminal emulation methods.

MAN - 12	All components proposed in the solution should be tenanted for each of STOCKHOLDING'S entities (STOCKHOLDING'S Subsidiaries) who may use the services. Each of the tenanted partition will be able to be configure separately and will have the same functionality as the overall system. Each of tenanted partition will be protected in such a way that they will have access controls at partition level and users of one partition cannot see data of other partition. At the same time StockHolding at a Central Level can see Reports, Manage and Control all Partitions collectively together from a Central location and Super Admin Login
MAN - 13	The Platform should be available 24*7 with minimum 99.9% availability
MAN - 14	Bandwidth and all Network requirements as per Technology Provider/SI proposed solution including LAN/WAN and any other Network components required, which are to be provided by the STOCKHOLDING, should be estimated, calculated and provided in the design document (with calculations and assumptions) by the Technology Partner/SI.
MAN - 15	List of all components being proposed in the Solution and their Maximum capacity/limits should be provided in the RFP Response. e.g. For Dialer Core Platform: Maximum Number of Agents, Maximum Calls Per Second, BHCC Capacity, Maximum Number of Campaigns etc.
MAN - 16	The Platform should be available to synchronize the call logger recordings on a real-time basis with a cloud based storage device. The maximum storage duration for each recording in the storage should be for 7 years. Storage should be in mp3 file format and NOT in raw audio format. Alternatively, The Platform can also provide storage for such in the same system and should be made available for 7 years. The storage can either be a managed storage through the same platform/independent storage created specifically for StockHolding
MAN - 17	The platform should able to allow making manual calls, manual Call forwarding through dialer and allow conference calls with 3rd person.
MAN - 18	The platform should be able to send SMS through platform's own gateway to collect feedback post an outgoing or incoming call. StockHolding's existing SMS Gateway will be used and to be integrated with the proposed platform
MAN - 19	MIS Billing should be available in the platform so that StockHolding is able to reconcile with the invoice shared by Vendor on a Daily/monthly basis
MAN - 20	All components proposed in the solution should be of the latest version that is available in the market at the time of going live. All latest stable versions should successfully tested in UAT/SIT environment before deploying into Production. All components should be upgraded to the latest versions without loss of feature/functionality as defined in the RFP during the period of contract at no additional costs. All components proposed in the solution should be able to meet the entire requirement of StockHolding during the period of the contract and platform / component versions and capacity should not be a limiting factor. Dialer Platform Provider will upgrade, change, add whatever is required without additional cost to meet the requirements
MAN - 21	Regardless of the phone type, the telephone should be able to support click to dial functions via the user's PC. All Technology components should be supported versions of software & hardware, used exclusively for StockHolding and subsidiaries/JVs. StockHolding should be able to audit the usage. Dialer Platform provider will have to share the BOM for all technology, systems to be procured, installed and implemented at/for StockHolding. The Bidder to provide and confirm that the proposed platform shall be compliant as per Government Regulatory bodies like TRAI/DOT etc.

MAN - 22	Number Masking - both Agent and customer should not be able to view each other's number and the numbers should be masked
MAN - 23	TrueCaller Business Integration - OEM should tie-up with True Caller Business to provide white labelling of the allocated numbers and verified badge help the customers know this is a genuine call and not spam - thus, improving call pick up rate.
MAN - 24	The OEM Platform or its SI will be responsible for setup and integration. The OEM Vendor or its SI will also need to deploy 1 Resident Engineer (RE) for L1/L2 Support and coordinate with OEM Platform Vendor any other support related to the platform and its infrastructure. However, final decision on taking the RE rests with StockHolding
MAN - 25	The OEM Platform will configure channels for inbound / outbound calling which will be used for manual and IVR based Outbound calling. The Platform will need to have – <ul style="list-style-type: none"> • Call Centre - 25 Channels with 1 Virtual Number • CDR HO - 50 Channels with 1 Virtual Number • CDR Branch Office – (200 Branches x 3) with 1 Virtual Number
MAN - 26	The Platform vendor will provide documentation and user training to branch and Head Office employees before Go-Live of the platform.
MAN - 27	Outbound Call - User should be able to make or receive a call using their landline/mobile number without the need for logging into the application
MAN - 28	Outbound Call - User should be able to make or receive a call using their landline/mobile number without the need for logging into the application
MAN - 29	The platform should have the facility to apply stick agent to an incoming call so that regular customer call can be routed to the same agent. This is required only for CDR - Head Office Team
MAN - 30	Servicing partner should comply with the statutory and regulatory requirements – <ul style="list-style-type: none"> • Compliance of TRAI Regulations • DND compliance • Compliance of Labour laws • Compliance of taxation laws • Compliance relating to software licenses • Compliance of local Govt. bodies rules • Compliance to IRDAI Regulations, IT Act • Compliance to DOT (Department of Telecommunication) guidelines etc.
MAN - 31	Rogue Agent – Notification to Lead in case agent is skipping the calls multiple times
MAN - 32	Mobile Compatibility of the URL Platform of the solution. The platform should be mobile compatible with the same feature list getting displayed on the mobile end point
MAN - 33	Offline Agent Mode - Audio Call to be routed without agent logging into the system in case the agent is not able to log into the platform for whatever reasons so that the agent productivity is not lost

Note: All features mentioned in the Mandatory Requirements have to be made available in the platform. In the event that Bidder/OEM is not able to satisfy even one requirement from the above, the said Bidder/OEM will be rejected/disqualified from further process.

6.1.2. MUST HAVE & GOOD TO HAVE REQUIREMENTS

1) AUTO DIALER

Sr. No.	Requirement Description	Feature Type
AD - 1	System should support encrypted web based application for the administrator to configure and manage the Dialer.	MUST HAVE
AD - 2	The Dialer system should support for standard API technology, to interface with external StockHolding applications.	MUST HAVE
AD - 3	Dialer should support business rules and parameters provided by third party/StockHolding application	MUST HAVE
AD - 4	The Dialer should be able to select target campaign agent for call routing based on the following: - <ul style="list-style-type: none"> • Select agent who has been available for longest time. • As far As possible, select same agent who serviced this same customer. • Select agent with the shortest expected delay • As far as possible, select agent with shortest average hold times • Assign specific agents to specific campaigns/customers 	GOOD TO HAVE
AD - 5	The Dialer System should routing / answering via landline phones / mobile handsets (any OS) and/or headset based conversations	MUST HAVE
AD - 6	Dialer System should support virtual call centre environment. The Dialer system should support a virtually partitioned call centre configuration that can manage multiple call centres for Dialer call distribution, Dialer Operations, Trunk Allocations, Load Levelling, Supervisory and Reporting functions, telephony features, and any additional call centre applications such as call recording, multi-channel interaction and CTI. All these partitioned setups should also have capability to be administered/monitored/reported and managed centrally by a super admin.	GOOD TO HAVE
AD - 7	System should support distributed site - based agents, remote agents, Work From Home Agents with all features and functionalities at all times.	MUST HAVE
AD - 8	Supervisors and call centre managers at the main location should be able to monitor the performance of remote sites / WFH / agents.	MUST HAVE
AD - 9	System should be able to suppress or block “do not contact” telephone numbers. The system should be able to allow the telephone numbers to be updated / removed / modified at any time during the campaign in bulk upload or one by one. System should also be able to suppress/block any number from calling StockHolding's contact numbers (inbound) (e.g. prank calls)	MUST HAVE
AD - 10	System should be able to maintain and concurrently call from multiple lists. System should be able to run multiple campaigns in different modes simultaneously.	MUST HAVE
AD - 11	System should be able to “Turn off” records from a particular queue (geographic region, area code, etc.), so that they won't be called again (for landline numbers only)	GOOD TO HAVE
AD - 12	System should be able to allow modifications in campaign parameters, if required during an ongoing active campaign.	MUST HAVE

AD - 13	The system should be able to detect Network Messages, Call Progression Tones, Busy Tones, SIT Tones, Answering machines, modem and other tones and save results to reporting system or perform specified actions as defined in the Campaign. Dialer and Voice Gateway should have an integrated Call Progress Analysis and it should be available to Dialer Operators/Supervisors in their Management Console both for real time and historical Call Progress Analysis.	MUST HAVE
AD - 14	Personal Call back: On request agents should be able to select personal Call back request for customers such that Dialer system will call back the customer at a scheduled specified time/day/date.	MUST HAVE
AD - 15	System should be able to run agent-less as well as agent based outbound event based campaigns.	MUST HAVE
AD - 16	Vendor supervisor or administrator should be able to create multiple campaigns, upload data, execute campaign and generate reports without any change in the source code. The system should have appropriate web-based GUI to perform these activities.	MUST HAVE
AD - 17	The system should mandatorily have all dialling modes like predictive, progressive, timed preview and manual dialling mode.	MUST HAVE
AD - 18	The maximum time required to re-assign an agent from one active campaign to another campaign by supervisor should be less than 1 min.	MUST HAVE
AD - 19	System should be able to set the maximum number of attempts to reach a contact in each campaign created. Dialer Operators/ Supervisors should be able to change the maximum number of attempts.	MUST HAVE
AD - 20	System should be able to add new customers in bulk upload or one by one to the call list for an ongoing campaign. System should be able to remove customers in bulk upload or one by one from the call list.	MUST HAVE
AD - 21	Dialer Operators/Supervisors should be able to perform real time monitoring and adjustments for outbound campaigns such as controlling the pacing of the call as “User Specified” or “System Specified”.	MUST HAVE
AD - 22	Standard reports should include reports on campaign performance analysis	MUST HAVE
AD - 23	Dialer Operators/Supervisors should be able to view the number of uncalled / pending contact numbers in each active campaigns.	MUST HAVE
AD - 24	Dialer Operators/Supervisor should be able to send a private IM and email message to a “logged-in” agent	MUST HAVE
AD - 25	System should be able to measure actual talk time (excluding preview, hold and wrap-up time)	MUST HAVE
AD - 26	System should provide agent productive reports including fields such as : <ul style="list-style-type: none"> • Total and average Preview time • Total and average Talk time • Total and average Wrap/ACW time • Total and average Hold time • Total and average Login time • Total and average Break time (Tea + Lunch + Bio + Training + Feedback) 	MUST HAVE
AD - 27	Verify that all list processing occurs with validating the Time Zone (IST – time zone), removing duplicate numbers, removing bad numbers, DNC list check filtering and indexing the calling list based on PHONE field.	MUST HAVE

AD - 28	The system should have web based remote monitoring tools. These should be using secure HTTPS connections.	MUST HAVE
AD - 29	The system should have voice and the data synchronization when the screen pop happens for all outbound calls to agents	MUST HAVE
AD - 30	The system should be able to update the DNC database from the standard published lists of such customers.	MUST HAVE
AD - 31	The system should be able to comply with the various international time zones.	MUST HAVE
AD - 32	The system shall provide user access administration	MUST HAVE
AD - 33	The system shall provide the facility for enabling/disabling the application as per the requirement	MUST HAVE
AD - 34	The system shall have a centralized operation and management interface which is available over a secure manner. Unified manageability, Administration and Real Time Monitoring should be web based and through a Secure access for remote access	MUST HAVE
AD - 35	The system shall generate the logs for all the activities of the users logging into the system and their corresponding activities	MUST HAVE
AD - 36	The system shall be able to log each event and alarm	MUST HAVE
AD - 37	The system and its various components shall be robust and designed for resistance to failures	MUST HAVE
AD - 38	<p>Call Disposition -</p> <ul style="list-style-type: none"> • The system should detect SIT tones and dispose separately. • The system should detect ring no answer condition and dispose separately • The system should detect no voice detect and dispose separately • The system should detect no ring back and dispose separately • The system should detect network busy and dispose separately • The system should detect network announcements and dispose separately • The system should detect answering machines properly and dispose separately • The system should detect no answer accurately in case of all kinds of hello or my tunes 	MUST HAVE
AD - 39	The system should configure number of rings to wait before declaring the call as 'no answer'	MUST HAVE
AD - 40	The system should be integrated with standard applications, CRMs or in-house applications or other host based systems	MUST HAVE
AD - 41	The monitoring software should be able to give records in the call table, records selected, records dialled, records left and recalls left along with the summarized total for each column	MUST HAVE
AD - 42	The agent should set call-back and call-back time/date. In the call- back window, the time should appear in drop down from where the agent should select. Specify the time gap with which the drop down displays the time/date	MUST HAVE
AD - 43	The administrator shall be able to check the status of all Dialer elements	MUST HAVE
AD - 44	Starting the campaign and stopping should be automatic, scheduled and manual	MUST HAVE
AD - 45	Real time monitoring should be secure web based	MUST HAVE

AD - 46	Historical reporting and raw data extraction should be done through web based tools (secure)	MUST HAVE
AD - 47	Should support Scheduling of the daily extract from the system for both Download and Upload processing.	MUST HAVE
AD - 48	Should support Restricting the Dialer not to call non reachable customer after the specified total attempts as per the business process.	MUST HAVE
AD - 49	Should support Restricting the agent recalls after the specified total attempts as per the business process.	MUST HAVE
AD - 50	Should support Purging selective records from the calling list or call table with appropriate user access rights	MUST HAVE
AD - 51	Pending agent recalls should be scrubbed.	GOOD TO HAVE
AD - 52	Should support Not Ready state of an agent (AUX) with multiple activity codes.	MUST HAVE
AD - 53	Multiple phone numbers per record/lead/account should be supported/configurable in a campaign for Dial Out usage (like Mobile Number, Home Number etc.)	MUST HAVE
AD - 54	Barge In/Monitoring of the outbound channels should be possible.	MUST HAVE
AD - 55	Monitor jobs running, outbound channels being used by each campaign, agent on the job with their current status, no of agents logged in each skill (language wise) both at central and individual partition level.	MUST HAVE
AD - 56	Login as inbound/outbound with basic soft phone features like ready for next call, hang-up, and submission of completion codes, release line and logout.	MUST HAVE
AD - 57	Create, change, generate standard reports and schedule reports to user inbox	MUST HAVE
AD - 58	Best Time to Call (Call Scheduling) should be supported at both Account/Record and Campaign Level.	GOOD TO HAVE
AD - 59	The Platform should support querying, retrieval, playing of recorded calls by Supervisors. Coaching functionality should also be available.	MUST HAVE
AD - 60	Agents should login to multiple campaigns/ skills concurrently and receive calls as per the priority set to the respective skills.	MUST HAVE
AD - 61	Agent should be able to dispose a call by specifying one or multiple (more than 1) disposition/completion codes as per the interaction of the call.	MUST HAVE
AD - 62	Agent should be able to conference live customers with supervisors or any escalation hierarchy.	MUST HAVE
AD - 63	Should have the ability to upload the calling text file from the local workstation into the Dialer, secure web based approach would be desirable.	MUST HAVE
AD - 64	Should have the ability to upload the data into a single campaign with multiple languages or services.	GOOD TO HAVE
AD - 65	Should have the ability to take backup (calling list, configuration, etc.) and Restore of backups	MUST HAVE
AD - 66	Should have the ability to create/change/delete general security plans, job security plans with the rights and privileges as per the role based hierarchical definition of users like ops managers and supervisors, Dialer operators, quality personnel, client service, agents, technology users and Others as desired.	MUST HAVE
AD - 67	Should have the ability to create/change/delete calling list, completion codes.	MUST HAVE

AD - 68	Should have the ability to create/change/delete calling list or jobs in real time during the shift hours of the operations.	MUST HAVE
AD - 69	Should have the ability to create strategies, selection and filters and jobs or services for campaigns	MUST HAVE
AD - 70	Should have the ability to create Dialer Agent GUI and screen popup from both the user defined and system defined fields. Ability to Customize and Specify the user/system fields, which should be use in the agent screen popup.	MUST HAVE
AD - 71	Should have the ability to change job settings like changing campaign pace, time zone, number of outbound channels on the fly	MUST HAVE
AD - 72	Should have the ability to create multiple disposition codes based on Campaign Types/Product Types etc. These dispositions should then be visible and selectable to the defined Campaign/Product Agents while calling.	MUST HAVE
AD - 73	Should have the ability of the system to directly upload data into the calling list or call table from any ODBC compliant host database.	MUST HAVE
AD - 74	System should be able to upload the hold music as mp3 files into the Dialer.	MUST HAVE
AD - 75	Dialer System should be able to queue multiple channels / integrations to outbound call centre agents. This includes voice calls, email, SMS (via Integration) etc.	MUST HAVE
AD – 76	Dialer System should be able to redirect unanswered calls. E.g. Agent left the seat without logout/Aux/Unavailable Mode Setting.	MUST HAVE
AD – 77	The proposed Dialer system should have the feature to identify the call disconnect (within StockHolding's agent environment), source of the call. E.g. Agent disconnected, Customer disconnected, etc. This should clearly indicate where the dis-connect happened. Reports for the same should be made available	MUST HAVE
AD – 78	Dialer System should support exporting of CDR reports data in multiple file formats which includes CSV and PDF	MUST HAVE
AD – 79	Dialer System should support transfer of CDR recording files systematically to cloud based storage device	MUST HAVE
AD – 80	Dialer System should have the option to automatically make the outbound agents available immediately after each call	MUST HAVE
AD – 81	The Dialer system should be able to restrict calling privileges of all Contact Centre Personnel by group/campaign/user, called number. International Dialling and Other restricted/premium numbers dialling should be restricted on the Outbound Trunks. Call and other system Privilege for agents, supervisors, managers should be based only on their roles, and process	MUST HAVE
AD – 82	Dialer system should be able to offer skill-based call allocation for both Outbound and Incoming Calls	MUST HAVE
AD – 83	Dialer should integrate with Vendor's / StockHolding's CRM applications like, Oracle etc. Provide the list of standard connectors and integrations supported from the Dialer platform.	MUST HAVE
AD – 84	Unique Call ID – A unique call ID has to be available for each call, Multiple agent interactions should have the same UCID logged.	MUST HAVE

AD – 85	Dialer subsystem should support Tone Masking (Critical Data Redaction) e.g. Key tones generated by customers while entering PII Data should be masked in a way that the agents cannot hear the DTMF tones.	MUST HAVE
AD – 86	The Dialer Platform and applications should be PCI- DSS compliant and certified	MUST HAVE
AD – 87	The Dialer should have the capability to shuffle Outgoing CLI dynamically through the Dialer Operator.	MUST HAVE
AD – 88	The Dialer should support Call Blending between: <ul style="list-style-type: none"> • Out bound and Inbound Agents • Between Voice, Chat, Email Multi Skill Agents 	MUST HAVE
AD – 89	The Dialer should have the capability to accept and route Incoming calls to Agents (Incoming/Blend groups) based on Incoming call distribution industry logics.	MUST HAVE
AD – 90	The Dialer System should support Account to Agent mapping for performing functions like RM Calling (where one Relationship Manager is responsible for their set of mapped accounts)	GOOD TO HAVE
AD – 91	The Dialer and related entities should have Comprehensive and User Friendly user interfaces for Agents, Supervisors, Dialer Operators and System Administrators for continuous access of the system to perform their relevant tasks	MUST HAVE

2) VOICE LOGGER

Sr. No.	Requirement Description	Feature Type
VLOG – 01	Voice logger system should support the Currently available industry audio compressions formats	MUST HAVE
VLOG – 02	Voice logger system should be capable of supporting remote configuration, status and replay via using secured web browser access.	MUST HAVE
VLOG – 03	The web browser interface should use https transport over a TCP/IP network.	MUST HAVE
VLOG – 04	Voice logger system should support web browser interface and should be able to access from multimedia PCs in the network without any special software install on the playback PC. This should be supported on Windows 7, Windows 10, Windows 11, Android and IOS Devices. The same should also be accessible from Mobile Devices like Tablets/iPads etc. and the Call Audio streamed seamlessly.	MUST HAVE
VLOG – 05	Voice logger system should have storing capacity of voice recording based on the agent size for a period of 30 days for live access by StockHolding, and then purged/Archived, as agreed with the StockHolding. These recordings will have to be sent to a cloud based cold storage. Transfer to be done at a period / frequency as defined by the StockHolding. The recordings should be made available for 7 years	MUST HAVE
VLOG – 06	StockHolding should be provided (if required) with the necessary hardware, software and a user interface to view, search and listen to the archived voice (within the OEM Platform as long as OEM retains it for 180 days).	MUST HAVE

VLOG – 07	The proposed voice recording solution should provide interface for StockHolding to listen to each calls that are recorded without any synchronization issues.	MUST HAVE
VLOG – 08	Voice logger system should support the following recording methodologies (but not limited to): - Selective - Agent Initiated	MUST HAVE
VLOG – 09	Voice logger system should support the following recording types: 1. Stereo Based recording where the Agent and Customer are recorded on separate channels 2. Sampling rate of recordings at source should be a minimum of 16k or higher.	MUST HAVE
VLOG – 10	Call Logger should support PII Masking and/or Redaction capabilities. These should be Agent Initiated or Post Facto masking/redaction methodologies.	MUST HAVE
VLOG – 11	Voice Recording is not required for Call Centre Agents. It is only required for CDR - Head Office and Branch Office	MUST HAVE
VLOG – 12	The platform should be able to extend the recording functionality to capture agent screen as well	GOOD TO HAVE

3) CTI CAPABILITIES

Sr. No.	Requirement Description	Feature Type
CTI - 01	Dialer CTI System should support third-party call control by using object-oriented and event driven application programming interface (API).	MUST HAVE
CTI - 02	Dialer CTI should integrate with StockHolding's CRM via API. Bidder's Dialer telephony and call logs needs to expose as APIs for integration to StockHolding's CRM.	MUST HAVE
CTI - 03	Dialer CTI System should allow agents to request supervisor assistance during active call	MUST HAVE
CTI - 04	The platform should support Screen POP integrated with StockHolding's CRM	MUST HAVE
CTI - 05	Dialer CTI should be able to use information from Dialer and send as CTI data to Agent Desktop, such as presenting current Campaign Status/Other relevant information to Agent Desktop.	MUST HAVE
CTI - 06	When an agent transfers a call to another agent, both voice and associated CTI data/screen should also be transferred with the call.	MUST HAVE
CTI - 07	When an agent requests a conference call with other agents, supervisors or expert group, both voice and associated CTI data should also be delivered to all party in the conference.	GOOD TO HAVE
CTI - 08	Each agent group or team can use different Agent GUI and have different popup CTI data.	MUST HAVE
CTI - 09	Agent should be able to save CTI data or input more information to each call data for later tracking and follow up.	MUST HAVE
CTI - 10	Agent should be able to see present status of supervisor/expert group	MUST HAVE

CTI - 11	System should support screen pop in synchronization with the call arriving on the agent's phone.	MUST HAVE
CTI - 12	Screen POP (3rd party integrated system) will happen as soon as the call is picked up by the agent	MUST HAVE
CTI - 13	Screen POP (3rd party integrated system) will be associated with customer information and the contact type (call, email, etc.)	MUST HAVE
CTI - 14	Screen pop (3rd party integrated system) details will be retrieved from StockHolding back end systems and other channels API's.	MUST HAVE
CTI - 15	The screen pop (3rd party integrated system) will have customer's contact history as well as the context of this interaction.	MUST HAVE
CTI - 16	Screen POP (3rd party integrated system) will be displayed in StockHolding's CRM and the interaction/call history of the customer calling along with interaction notes wherever applicable.	MUST HAVE
CTI - 17	Screen POP will have Dialer call attempts and other contact history available to the agent with the platform (agent screen)	MUST HAVE
CTI - 18	Dialer CTI system will provide end to end tracking of the interactions right from the time when the call is Dialed from the Dialer till the time the call is disconnected	MUST HAVE
CTI - 19	CTI should be able to provide soft phone controls to be embedded on the agent's desk top application. CTI is the core component of the Contact Centre. StockHolding will prefer a Browser based CTI without the need to install anything on the agent desktop. Authentication of Agents should be able to login by SSO to reduce the complexity.	MUST HAVE
CTI - 20	CTI solution should provide the agents with the details of the relevant last interactions or transaction that the customer had with StockHolding across all channels including but not limited to Voice call, email, chat, SMS etc.in the desktop application.	GOOD TO HAVE

4) INTEGRATIONS

Sr. No.	Requirement Description	Feature Type
INTG - 01	The system should be able to integrate and connect to different technology & tools with StockHolding such as CRM, Data warehouse etc.	MUST HAVE
INTG - 02	The system should build a database of call index/call information derived from real time and post event CTI interfaces. All such data and other Dialer Data shall be held within a call database on a central server. This Server should be able to integrate with StockHolding Data warehouse/Data Lake/Other Backend Systems for Data Analytics purposes	MUST HAVE
INTG - 03	The system should have Integration to MS Active Directory (AD) and other SSO Systems	MUST HAVE
INTG - 04	The proposed Dialer and voice recording and agent quality evaluation solution should be able to integrate to a HRMS solution and any Organizational Hierarchy Systems if provided by the	MUST HAVE

	StockHolding/Other entities. This is for the automation of User Creations/Deletions/Changes and Team Groups/Hierarchy.	
INTG - 05	Ability to integrate with Email Servers and Web Servers to send/receive requests and notifications to Contact Centre Agents and Integrate with the overall Contact Centre Applications.	MUST HAVE
INTG - 06	Ability to integrate with 3rd party components specifically databases (via API's) and CRM application	MUST HAVE
INTG - 07	Ability to integrate with External/3rd Party Speech Servers for both Real Time Speech Applications and Offline Speech Applications.	MUST HAVE
INTG - 08	Ability to integrate with StockHolding Backend Systems for Download/ Upload/List Management related activities on an automated method.	MUST HAVE
INTG - 09	Ability to integrate with StockHolding Backend Systems for List Management / Updation related activities (in real time) using API /other methods (eg. For making instant call backs to Digital Drop off Customers)	MUST HAVE

5) OUTBOUND IVR

Sr. No.	Requirement Description	Feature Type
IVR - 01	Ability to Create Campaigns for Automated Outbound IVR Calling basis Customer Segmentation based on Product, Campaign, and Priority. Capability to : – Execute different types of Outbound IVR scripts – Business Hours check on each day of the week to set the Automated Outbound IVR Calling Functionality – Define non-working days for each week/month for Automated IVR Calling Functionality	MUST HAVE
IVR - 02	Administration module for different Out Call options to different segments of customers. 1. Register Outbound IVR Call for a later Date & Time if call rejected by Customer 2. Record Customer Name on Outbound IVR Call 3. Record Customer Message on Outbound IVR Call	MUST HAVE
IVR - 03	On Customer acceptance detection – Play greeting with Customer name – Play Custom Message	GOOD TO HAVE
IVR - 04	Integrated Call Progress Analysis between Outbound IVR and Voice Gateway should be available to Detect outcomes like Busy, Network Messages , SIT Tones , answering machine etc. both for Call Handling and Reporting purposes	MUST HAVE

IVR - 05	Should provide the following Reports: Real time Console is to be available to view status of the number of Outbound IVR Calls. 1. Pending 2. Failed 3. Closed for every 30 minute interval for the day 4. Ability to export reports to excel, pdf, etc	MUST HAVE
IVR - 06	Historical Reports to be available in both tabular and graphical format – Outbound IVR Call back Success/Failure Report – Turn Around Time Report – Outbound IVR Call Detail Report	MUST HAVE
IVR – 07	Dynamic IVR based Outbound Call ~ IVR Blaster feature. Some parts of the campaign can be static and some parts may be dynamic.	GOOD TO HAVE

6) MIS – REPORTING

Sr. No.	Requirement Description	Feature Type
RP - 01	All real time / historical reports to be available in daily, weekly, monthly aggregations.	MUST HAVE
RP - 02	Should support tabular and graphical reports	MUST HAVE
RP - 03	Ability to Integrate Dialer Platform Reporting Server/Entity with StockHolding Centralized Reporting System/Data Warehouse or any other reporting platform/entity in a secure manner	MUST HAVE
RP - 04	Support multi-channel real time reporting for Voice channel	MUST HAVE
RP - 05	Outbound Contact Centre Channels (all data to be by individual Agent/Campaign and aggregated to overall Contact Centre). Proposed solution should offer the following data for Campaigns/Agent/Teams : - Number of outbound calls offered - Number of outbound calls answered by agents - Number of short abandoned calls (less than 10 seconds) - % of short abandoned calls (less than 10 seconds) - Number of abandoned calls - % of abandoned calls - Average time to abandon - Max time to abandon - ASA (Average Speed of Answer) - Number of Logged-in agents by the hour - Number of agents available by the hour - Number of agents Not Ready (and broken down by reasons)	MUST HAVE
RP - 06	Agent Performance (by individual and group both should be provided for the following by the hour) - Average Talk time - AHT - Average Wrap/ACW - Number of outbound calls made - Number of transfers made/received - Number of consult calls made	MUST HAVE

	<ul style="list-style-type: none"> - Average time to answer - Total Login time - Total Ready Time - Total Not Ready Time (and broken down by reasons) - Agent Utilization 	
RP - 07	<p>Outbound IVR Report</p> <ul style="list-style-type: none"> - Total Number of OVR calls - Call Split by Product/Language other parameters - Transaction count reporting - Call Attempts Dialed - Call Attempts Successful - Call Attempts Failed - Call Attempts Pending - Outbound IVR Call Detail Report 	MUST HAVE
RP - 08	Report searching, ‘drill-through’, ‘drill-down’ and one-click export to Excel, PDF, web pages, XML or CSV	MUST HAVE
RP - 09	Vendor should provide all out of the box (or default) real time / historical reports available in the proposed Dialer solution as “Report Name” and its data elements in a Separate Annexure	MUST HAVE
RP - 10	Vendor should provide detailed reports on Dialer Term/Disposition Codes, Penetration, Dial Attempts etc.,	MUST HAVE
RP - 11	Ability to create Custom Reports	GOOD TO HAVE
RP – 12	The Platform should be able to capture Sentiment Analysis of the Customer like whether the conversation was a SATISFACTORY, ANGRY, etc.	GOOD TO HAVE

7) DESKTOP APP

Sr. No.	Requirement Description	Feature Type
DA - 01	The Dialler agent desktop application should be a standard browser based application without any additional software or plug-in with user access rights, multiple roles, etc.	MUST HAVE
DA - 02	The agent should be able to use the Single Sign On and single desktop application to login to all partner other applications like Dialler/Telephony, CRM/GUI, StockHolding Provided Backend Application Access, Knowledge Management etc. The Agent should click on the specific tabs to navigate through different above applications. This Desktop GUI is required at time of implementation or start of migration. The Dialler GUI should also have the capability to integrate with the StockHolding provided Agent Desktop	MUST HAVE
DA - 03	The Agent Desktop Application should be able to integrate using methodologies like API's etc. with StockHolding Backend Systems if required	MUST HAVE
DA - 04	The Agent Desktop Application should be able to act as a Single Update Window such that when Agent updates disposition/other information on this application, they are automatically updated on other systems like Dialler, CRM/GUI database, StockHolding Backend (if required) etc.	MUST HAVE

DA - 05	The desktop application should provide soft phone functionality embedded in the application	MUST HAVE
DA - 06	The Desktop Application should have the ability to Customize /Add/Remove fields as per process/business/call type requirements	MUST HAVE
DA - 07	The Desktop Application should be able to provide flexibility to add multiple Disposition type codes. These should also be configurable as per campaign/group type specifically.	MUST HAVE
DA - 08	The desktop application should provide login and logout reports that are time stamped for each user	MUST HAVE
DA - 09	The desktop application should be able to record all interactions with sufficient details and provide complete interaction history of the callers pulled across multiple channels. Whenever a caller having a history with Contact Centre interacts, his previous interaction history has to be popped in the application.	MUST HAVE
DA - 10	Agent should have call control capability on desktop to control uses of their soft phone:	MUST HAVE
DA - 11	Desktop application should allow agents State Control (Ready, Not Ready, Login, Logout, Work Mode)	MUST HAVE
DA - 12	Telephony Control (Answer, Hold, Transfer, Conference, Make Call, Release) should be provided in this application as Telephony Functions	MUST HAVE
DA - 13	Agent should be able to see real-time statistic information on followings in screen - Agents should be able to see the real time status of their group and supervisor - Number of contacts serviced by the agent since login time - Average Handle time (Supervisor Level) - Monitor campaign statistics for their specific campaign. - Total and Average time spent in each agent state (Ready, Not Ready, Talking, Work Mode) (At Supervisor Level) - Agent Chat should also be available	MUST HAVE
DA - 14	The desktop should present Agent with reason codes to select when Agent chooses to temporarily go to “Not Ready” state. The system should keep this statistic and this should viewable to view in historical reports.	MUST HAVE
DA - 15	When Agent is being silent monitored, system should have an option to notify agents that they are being monitored.	MUST HAVE
DA - 16	The agent desktop Dialler application should have the ability to run and be published in a Remote Desktop environment keeping all its functionalities available and useable	MUST HAVE
DA - 17	The design, backend end setup and overall architecture of this Desktop Application should meet Industry and StockHolding specified security parameters	MUST HAVE
DA - 18	All customer information shall be immediately available on-screen, with a quick drill-down to available details.	MUST HAVE
DA - 19	The application shall support query by any field, i.e. the agent/supervisor can enter available data in any specified field on any screen and click Search. E.g. Account	MUST HAVE

DA - 20	The application shall support automated escalation through the use of on-screen alerts, to keep parties involved informed about what is happening with the customer.	GOOD TO HAVE
DA - 21	The application should be able to be quickly and easily customized to meet StockHolding business processes and requirements.	MUST HAVE
DA - 22	The design, backend end setup and overall architecture of this Desktop Application should also be able to Integrate with Real Time Speech Analytics (RTSA) Services, to show in this Desktop Application, Agent Assistance Pop-Ups etc. as pushed by the RTSA application	MUST HAVE
DA - 23	Agent Desktop should have Omni-Channel capabilities to display interaction data related to all channels like Voice, Chat, Email etc. in a Unified Agent Desktop	MUST HAVE
DA - 24	Supervisor Desktop Application should have all Agent Desktop features and in addition the features specified below: - Supervisor should have call control capability on desktop and soft phone embedded - Telephony Control (Answer, Hold, Transfer, Conference, Make Call, Release) - Agent State Control/Override capability (Ready, Not Ready, Work Mode, Wrap mode, Hold mode Logout)	MUST HAVE
DA - 25	Supervisor should be able to send one-way text messages to their teams through communication messenger. All agents in the same team should receive same message concurrently.	MUST HAVE
DA - 26	Real-time Statistics of agents, Campaigns/skills, groups and other entities	MUST HAVE
DA - 27	Real-time team statistics: Presents the details of each individual campaign/skill group, such as how many calls have been handled with its average talk time, disposition grouping (like total PTPs/Sales Made etc.) average speed of answer, AHT etc..	MUST HAVE
DA - 28	Real-time agent statistics: presents the real time state of the agents on the selected team who are currently logged into the Dialler. The state should show agent performance, i.e. number of calls handled, average talk time, AHT etc.	MUST HAVE
DA - 29	Real-time agent state: presents the status details for each agent on the team, i.e. Ready, Not Ready, Reason Code.	MUST HAVE
DA - 30	Real-time agent vs. team statistics: display presents the performance details for the agent and compares them to the performance details of the team.	MUST HAVE
DA - 31	The information presentment to agent/supervisors desktops should be comprehensive and information gathered from various sources such as Dialler/CRM/GUI/Knowledge Management and Other Databases and any other applications should be able to be presented to the supervisors.	MUST HAVE
DA - 32	All customer information shall be immediately available on-screen, with a quick drill-down to available details.	MUST HAVE

DA - 33	The application shall support query by any field, i.e. the agent/supervisor can enter available data in any specified field on any screen and click Search. E.g. Account Number, Phone Number, Email ID, Username etc.	MUST HAVE
DA - 34	The application shall support automated escalation through the use of on-screen alerts, to keep parties involved informed about what is happening with the customer.	GOOD TO HAVE
DA - 35	The application should be able to be quickly and easily customized to meet StockHolding business processes and requirements.	GOOD TO HAVE

8) CLICK TO CALL

Sr. No.	Requirement Description	Feature Type
CTC - 01	The Platform and Solution should be able to Integrate with StockHolding Website/Mobile App/WhatsApp (Integration) in order to get requests for Click to Call initiated by Customers on the website and then initiate an Agent Based Outbound call to those specific Customers	MUST HAVE
CTC - 02	Should allow customers to request for call back using StockHolding website/Mobile App	MUST HAVE
CTC - 03	System should provide details entered in the click to call feature to agents when they are calling back	MUST HAVE
CTC - 04	Should be able to reach the Outbound Call Centre using the click to call functionality from StockHolding website	MUST HAVE
CTC - 05	The interaction should be routed to respective Outbound skills in the call centre based on the origin option of click to call initiation	MUST HAVE
CTC - 06	Should provide an option to reserve an agent before calling the customer	MUST HAVE
CTC - 07	Should provide the agent to log the call disposition	MUST HAVE
CTC - 08	Agent should be able to configure the next steps and workflow based on call disposition code	GOOD TO HAVE
CTC - 09	Should be able to provide reports on the number of click to call requested, successful attempts, duration of each call etc.	MUST HAVE

9) CAMPAIGN AND LIST MANAGEMENT

Sr. No.	Requirement Description	Feature Type
CLM - 01	The platform should have an Advance Dialler Campaign and Lists Management Application to cater for a tenanted multi partner, multi list/campaign, and real time high volumes.	MUST HAVE
CLM - 02	The Advance Dialler Campaign and Lists Management Application should have an ability to create and manage calling lists from input data files which are received from the StockHolding systems. These files should be accepted through Automated, Manual (through console) or API based methodologies.	MUST HAVE

CLM - 03	The Advance Dialler Campaign and Lists Management Application should be able to create multiple Campaigns from lists and check and validate those against DNC and various other Barring lists created by the Business or as per Compliance requirements.	MUST HAVE
CLM - 04	<p>The Advance Dialler Campaign and Lists Management Application should have a Robust Campaign Management Console to perform activities like:</p> <p>A. Viewing Real Time Campaign/Lists performance and other dashboards to manage/control Operations</p> <p>B. Manage Pacing Ratios, Dialling mode preferences for Campaigns etc.</p> <p>C. Perform Real Time Actions such as Start/Stop/Pause/Resume/Suspend/Change Priority etc. on Campaigns and Lists.</p> <p>D. Activate/Deactivate Rules and Filters for Records/Lists/Campaigns in Run time.</p> <p>E. Capability to modify list records data fields</p>	MUST HAVE
CLM - 05	<p>The Advanced Dialler Campaign and List Management Application should have a Scheduling and Auto Management Module that enables functionalities like:</p> <ol style="list-style-type: none"> 1. Scheduling Jobs for Calling/ DNC/Barring Lists creation based on predefined formats/rules. 2. Scheduling jobs for List Scrubbing as per compliance requirements 3. Scheduling jobs for Auto creation of Campaigns from Pre-Defined and Scrubbed lists. 4. Scheduling jobs for Call Table Clean Up activities in order to ensure optimized performance of application 5. Start/Stop/Suspend a list automatically based on defined events or specific date/timed-based events 6. List script/rules automation based on operands like Minimum, Maximum, Count etc., of the defined list parameter values 	MUST HAVE
CLM - 06	<p>The Advance Dialer Campaign and Lists Management Application should have a rigorous and effective Compliance Manager that helps perform activities like :</p> <ol style="list-style-type: none"> 1. Creation and Management of Compliance Rules as per Regulatory and Business requirements. 2. Building/Updation and Management of DNC/Barring 3. Checking and Scrubbing Dialling Lists/ records before start of calling against DNC/Other Barring Lists. 4. Perform checks in lists on Rules based on previous account/number contact history or other business defined conditions for Compliance etc. to ensure overall list and campaign compliance. 	MUST HAVE
CLM - 07	The Advance Dialer Campaign and Lists Management Application should have the capability to integrate through API to consume real time flags from external data sources for list and Campaign updation and processing. Eg. for Real Time Call backs through Active	GOOD TO HAVE

	Campaigns to Hot Leads coming from other channels like websites etc.	
CLM - 08	The Advance Dialer Campaign and Lists Management Application should have the ability to define different redial logic for various number types based on disposition	GOOD TO HAVE
CLM - 09	<p>The Advance Dialer Campaign and Lists Management Application should have Additional Features for enhancing Campaign Effectiveness with features like :</p> <ol style="list-style-type: none"> 1. Advanced Restriction: <ol style="list-style-type: none"> a. Phone Number Level/Other Fields related calling restriction and not only account level restriction. b. Restrictions for a specific account/customer applied to multiple lists c. Ability to track and restrict numbers when an assigned threshold is attained. d. Disposition or Time period based restriction on Account/ Number. 2. Advanced Treatments: <ol style="list-style-type: none"> a. List based, disposition count related Business treatment/actions. b. Alternate number dialling for accounts with multiple numbers for increasing calling effectiveness. c. Ability to mark list records during campaign run time, basis specific parameters attained, in order to move them to a Sub-List for a differentiated treatment 	GOOD TO HAVE
CLM - 10	Capability to share a single large list across multiple systems/tenant partitions with the ability to define priority to records to be worked irrespective of the occupancy/availability of agents on any one system/tenant partition.	GOOD TO HAVE
CLM - 11	Capability to modify list records data fields within the day without taking the list offline from agents.	GOOD TO HAVE
CLM - 12	User Friendly and intuitive Visual and Graphical UI for the Dialer Operators to perform various Campaign Management and Reporting tasks in Real time and Offline modes.	MUST HAVE
CLM - 13	The Advance Dialler Calling Lists Management Application should be able to provide relevant reports for the functionalities being performed.	MUST HAVE
CLM - 14	The Advance Dialler Calling Lists Management Application should also be able to provide relevant reports for the occupancy level and system capacity parameters.	MUST HAVE
CLM - 15	The Advance Dialler Calling Lists Management Application should be able to meet the load /progressive call volumes	MUST HAVE
CLM - 16	The Platform and System should be designed for a High Availability Setup with required redundancies of its components/subcomponents.	MUST HAVE

CLM - 17	List of all Features and Capabilities for Campaign and List of Management to be provided as part of the response. The list should clearly specify in a tabular format : - The Feature Name - The definition /explanation of the Feature - Example of usage of the feature for the Dialler Operators/Outbound Business Users in Sales/Collections/Others processes	MUST HAVE
CLM – 18	Platform should have provision to create and maintain a DNC (DO NOT CALL) List. The list should be made editable at any time and should allow user to download it	MUST HAVE

10) DASHBOARDING AND MONITORING

Sr. No.	Requirement Description	Feature Type
DMO - 01	System should have consolidated reports to show all activities performed by an outbound agent including Contact Centre productivity on phone, email, and web etc.	MUST HAVE
DMO - 02	The reports should match total calls reported with the sum of total reported from each media type.	MUST HAVE
DMO - 03	Reporting system should be able to create and save templates for user defined reports	MUST HAVE
DMO - 04	Reporting system should support Bar, Line, Three- Dimensional and colour graphics reports for screen(Large and Small Screen like PC/Tablet/Mobile) and paper print viewing	MUST HAVE
DMO - 05	The report data should be exported in popular file formats such as .txt, .excel, .csv or made available in a separate reporting database to be synced with StockHolding Data warehouse/Other Reporting/Analytics Systems	MUST HAVE
DMO - 06	System should provide threshold settings for real-time monitoring & reporting for each group/campaign or relevant Dialler components e.g. 30 minutes or 15 minutes etc.	MUST HAVE
DMO - 07	Users should be able to customize standard reports, if required	GOOD TO HAVE
DMO - 08	The system should provide necessary information to supervisors to effectively monitor and manage agents as well as customer calls on a real-time and historical basis. This will enable supervisors to manage KPI's such as Connect Rates, PTP's, Conversion rates etc. as well as staffing levels more effectively.	MUST HAVE
DMO - 09	This should include all kind of reports for all entities, for example Dialler, Outbound Campaigns, Outbound Agent, Call Lists/Download Performance CTI etc. - Agent Performance - Campaign wise statistics - Language wise statistics - Dialler utilization - Outbound IVR performance (Answered, Abandoned, Customer disconnected etc.) - Any customizable report on Dialler	MUST HAVE

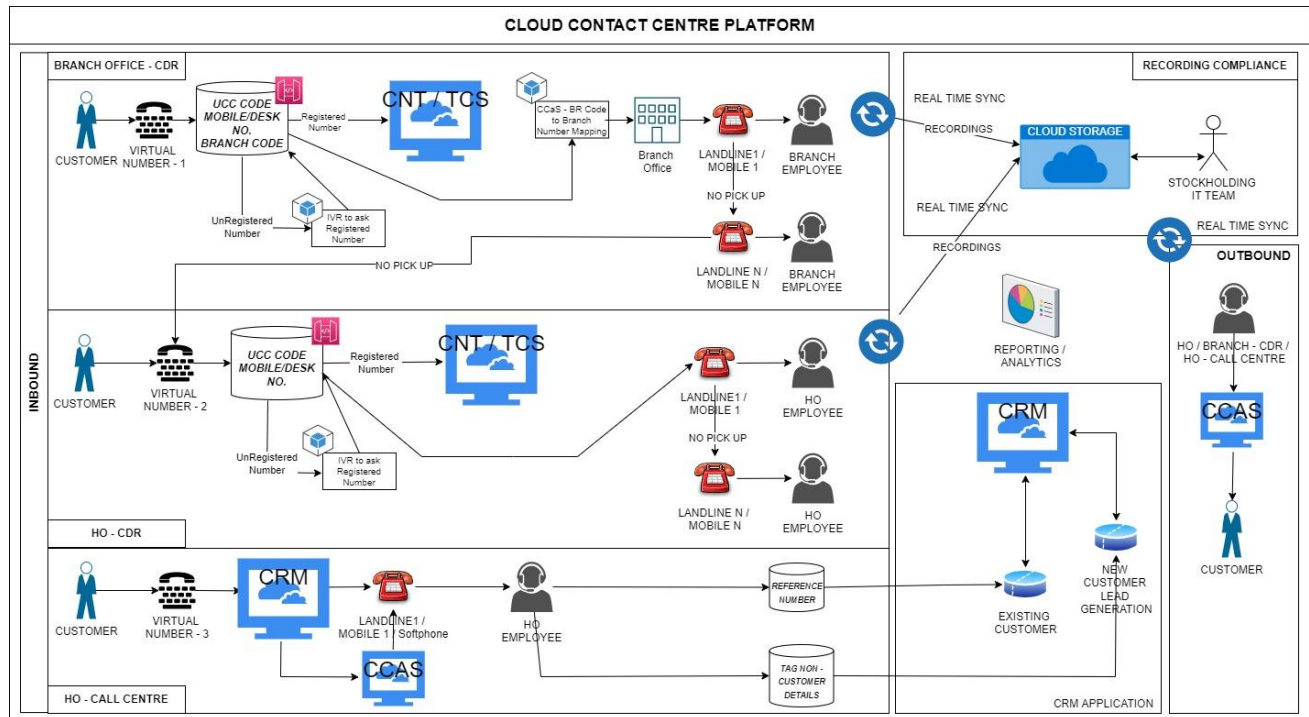
DMO - 10	The system should have consolidated reports to show all activities performed by Dialler, IVR, and Outbound Agent including Contact Centre productivity on phone channel	MUST HAVE
DMO - 11	The System should have the way to display alarm information to agents and supervisor regarding outbound agent, campaign, staffing and other Dialler parameters related information.	MUST HAVE
DMO - 12	System should provide date and time stamp for each event in IST.	MUST HAVE
DMO - 13	System should include Dialler activity report	MUST HAVE
DMO - 14	<p>StockHolding should be provided with a secure portal access to monitor real time and historical reports. The report should contain the following features -</p> <ol style="list-style-type: none"> 1. Current Calls in Dialler 2. Current Inbound Calls in Queue (Blend) 3. Calls being handled by outbound agents 4. Calls that are under wrap-up 5. Logged in outbound agents, Blended/Inbound Agents 6. Status of all logged in Outbound, Blended/Inbound agents (available, aux etc.) 7. Number of calls/interactions handled by campaigns 8. Number of calls/interactions handled by each agent 9. Number of interactions waiting in queue (voice, email, chat etc.) 10. Defined Dialler metrics Vs goals for each campaign/interactions 11. Detailed abandoned report 12. Real time and historical 13. Abandoned report at campaign level 14. Short calls (Calls disconnected in less than 10 seconds) at Dialler Queue and Agent level. 15. Total productive connect minutes for Outbound agents 16. Total productive connect minutes on Outbound IVR 	MUST HAVE
DMO - 15	<p>Productivity reports that has to be provided on the portal for StockHolding access:</p> <ol style="list-style-type: none"> 1. Utilization of Outbound PRI/SIP/GSM etc. lines in hourly intervals. 2. Utilization of Dialler in hourly intervals 3. Utilization of Outbound/Blended/Inbound agents in hourly intervals 4. Utilization of outbound IVR in hourly intervals 	MUST HAVE
DMO - 16	Portal should have the capability to give summary and the ability to drill down functionality from summary to detailed report.	MUST HAVE
DMO - 17	Reporting system should provide date time stamp for each event / activity tracked for a given call in IST Time zone.	MUST HAVE

11) IVR FLOWCHART

<p>IVR FLOWCHART:</p> <p>IVR Flowchart will be discussed during Implementation Phase. It will be a simple IVR of approximately 25 steps</p>
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12) WORKFLOW REQUIREMENTS AND PROCES FLOW

Process Flow :



1. User Group is divided into 3 communities –
 - a. Trading Community ~ CDR at Branch Offices
 - b. Trading Community ~ CDR at Head Office
 - c. Call Centre / Customer Service Community at Head Office
2. There will be 3 different numbers which will be published to external customers i.e. one virtual number for each of the above 3 user groups
3. Branch Office CDR –
 - d. If customer calls from registered (same contact details present in CNT/TCS system) contact number, the same is authenticated in the CNT/TCS system via API and will fetch customer details such as UCC Code, Name, Branch Code etc.
 - e. If customer calls from unregistered number, then IVR will prompt customer to enter registered number and follow the above step
 - f. After 3a, the contact centre platform will fetch the branch number corresponding to the branch code fetched in 3a
 - g. After getting the branch number in 3c, the call is diverted to the actual mobile/landline number of the user
 - h. The contact centre platform will also trigger via API call a pop up screen on the trader terminal at branch to shows customer details for verification
 - i. If no incoming call is picked, the call will go into voice mail
4. Head Office CDR –
 - j. Head Office CDR process is similar to Branch Office CDR with the difference that there will not be any mapping of the Branch Code with Branch Number since Head Office CDR team members will be answering the calls
5. Both Branch Office and Head Office CDR’s conversations need to be recorded and stored for 7 years.

6. HO Call Centre will have integration with CRM only and all conversation logs along with agent comments needs to be synced real time with CRM
7. For Branch and HO CDR user groups, facility should be available for trader to place an incoming and outgoing call using his analog/mobile phone instrument without logging into the contact centre platform
8. Each user group community access including Branch level access will ensure that branch CDR person / Branch Manager or Call Centre Lead will be able to update the contact numbers for receiving incoming call and monitor the calls on a daily basis including missed calls

6.2 STATISTICAL INFORMATION

The below information is provided in a best effort basis. The actual numbers may vary except for number of branches

Average Number of Calls (Incoming / Outgoing) at Branch CDR / month	2,30,000
Average Number of Calls – Outgoing at Branch CDR / month	81,500
Average Number of Calls – Incoming at Branch CDR / month	1,48,500
Average Number of Calls (Incoming / Outgoing) at HO CDR / month	30,000
Average Number of Calls – Outgoing at HO CDR / month	3,000
Average Number of Calls – Incoming at HO CDR / month	27,000
Average Number of Calls (Incoming / Outgoing) at HO Call Centre / month	57,000
Average Number of Calls – Outgoing at HO Call Centre / month	27,000
Average Number of Calls – Incoming at HO Call Centre / month	30,000
Average Incoming Call Duration at CDR (HO or Branch)	3 minutes
Average Outgoing Call Duration at CDR (HO or Branch)	3 minutes
Average Incoming Call Duration at Call Centre	3 minutes
Average Outgoing Call Duration at Call Centre	12 minutes
Average Storage of Call Recordings at Branch CDR/ Year	1.5 TB
Average Storage of Call Recordings at HO CDR / Year	1 TB
Total Branches	195
Approximate Number of Branch CDR Users	195
Approximate Number of HO CDR Users	15
Approximate Number of HO Call Centre Users	08

6.3 IMPLEMENTATION PHASES

- a) Phase I – Call Centre Platform and Integration with CNT/TCS FO Application for Branch CDR, HO CDR and Call Centre along with recording
- b) Phase II – SMS Integration inbound call feedback and Integration with CRM for Call Centre
- c) Phase III – Outbound Campaign Management

6.4 TECHNICAL REQUIREMENT

- a) High Availability
- b) Seven Year Recording storage
- c) Recording Header should be – UCID-Received / Dialed Number-Timestamp
- d) Complete responsibility for Technology platform management – license management, Upkeep, Upgrade, Monitoring, Fine tuning, backup, restoration, service delivery as per defined SLA, support staff including requisite skill management in line with support requirement.
- e) Proposed solution should be supported for 5 years inclusive of all cost.
- f) Data exchange and integration

- g) Details of the data stored on with Service provider and the security measure to safeguard data.
- h) Conduct DR Drill test and participate in BCP test
- i) Bidder must specify Hardware (Server, Storage, and Network) /Software/Connectivity requirement.
- j) Desktop configuration requirements
- k) Project implementation timeliness

6.5 ESCALATION MATRIX

Bidder will provide their support service contact numbers, escalation matrix (designation, contact numbers & emails)

6.6 NON-DISCLOSURE AGREEMENT

Bidder hereby indemnify, protect and save StockHolding against all claims, losses, costs, damages, expenses, action suits and other proceedings, resulting from infringement of any patent, trademarks, copyrights etc. or such other statutory infringements in respect of all the equipment offered by the bidder. Any publicity by bidder in which name of StockHolding is used should be done only with the explicit permission of StockHolding. Bidder will sign Non-Disclosure Agreement and should be valid till Project completion period.

Note: *StockHolding* reserves the right to alter, addendum or reduce or remove the bill of quantity requirement without assigning any reasons to the bidder.

7. PROJECT TIMELINES AND PAYMENT MILESTONES

7.1 PROJECT TIMELINES

Sr. No.	Milestone	Maximum timeline
1.	Submission of final project implementation plan and Signing of SLA.	02 weeks from date of Purchase Order
2	Configuration and Delivery of the Outbound Contact Centre Tech Stack and Manpower partner sites. Installation, deployment and Integration and configuration of the solution.	Bidder to propose
3.	UAT clearance and Security Review of the solution and closure of observations of security review and readiness for production setup. Helpdesk setup and manpower deployment.	Bidder to propose
4.	Training of StockHolding's staff and Go live	Bidder to propose
5.	Go live timelines for setup of new sites as per requirement of the StockHolding	Bidder to propose
7.	Addition/Deletion of licenses as per requirement of the StockHolding	1 week from date of Order/ Confirmation by the StockHolding.

7.2 PAYMENT TERMS

- a) Any upfront payment costs which is not a monthly recurring cost, shall be highlighted upfront. 50% of the upfront cost shall be paid by StockHolding post UAT Sign off Date. The Balance 50% shall be paid on or before 1 month of the GO-LIVE Date.
- b) Monthly payment will be released based on the actual usage for the entire period of the contract. Successful bidder need to submit monthly usage report to StockHolding along with the monthly invoice.
- c) 50% of the UAT Sign off Date payment will be released only after submission of Bank Guarantee to StockHolding.
- d) Applicable taxes payable at actual as per prevailing rate of taxes as per Government notification. Applicable deduction if any may / will be recovered (deducted) from the payment(s).

8. SLA AND PENALTIES

Bidder has to ensure the Solution/support should comply the RFP/SLA terms and penalties will be imposed on breach of RFP/SLA terms as mentioned below.

All SLAs are applicable on working hours as defined by the StockHolding, operations are tentatively to run for all days in a month, 12 hours per day in a window from 8 am to 8 pm. The defined 12 hours may be modified at the sole discretion of the StockHolding.

8.1 AVAILABILITY SLA'S

S. No	SLA parameter	Measure Unit	Measure frequency	Reporting frequency	Service level
01	End to End Critical system Availability, platform availability including Auto Dialer, Agent and Supervisor Interfaces, CTI's, API's, Campaign Manager	% duration in a month that the end-to-end system was functional and running as expected	Daily	Monthly	>= 99.90%
02	Reporting Tool	% duration in a month that the sub-components were functional and running as expected	Daily	Monthly	>= 99.90%
03	Compliance Call and Screen Recording	% calls recorded in a month	Daily	Monthly	>= 99.90%
04	Site support	% Cumulative duration for which Bidder provided Support staff (including L1/L2/SMEs, Technical staff etc.) are available as agreed between the successful bidder and StockHolding	Daily	Weekly	100%

Downtime due to externalities out of control of the selected bidder shall not be considered in SLA computation. Such downtimes need to be aligned between the StockHolding and the vendor at the Contract Phase of the Project.

End-to-End system availability is calculated as the total time system is available/total time system was required.

For example, if the system is to be available 25 days a month, 12 hours a day (as defined by StockHolding working requirements) then denominator of above equation becomes 25 x 12 = 300 hrs.

In case the dialer is down for 1 hr., then system availability = $(300 - 1)/300 = 99.67\%$

In case the dialer is down for 1 hr., and the reporting tool is down for 0.5 hrs separately, then system availability = $(300-1-0.5)/300 = 99.5\%$

In case the dialer is down for 1 hr., the reporting tool is down for 0.75 hrs but the downtime overlaps for 0.25 hrs, then system availability = $(300-1-0.75+0.25) = 99.5\%$

The vendor must provide accurate and timely reports to verify the downtimes of various systems as mentioned in respective SLAs. The vendor is also expected to report the total system availability as explained below. The details of the same will be verified by StockHolding.

8.2 INCIDENT MANAGEMENT SLA’S

S. No.	SLA parameter	Measurement unit	Severity class	Measurement frequency	Reporting frequency	Response time within	*Restoration time within
01	Main End to End System or Sub System Level restoration duration	Time taken since reporting of incident	Severity Class 1	Daily	Monthly	15 mins	1.5 hrs
02			Severity Class 2	Daily	Monthly	15 mins	2 hrs
03			Severity Class 3	Daily	Monthly	15 mins	3.5 hrs

The SLA between selected Bidder SI and the platform/sub-component OEM/Provider needs to be in place in such a way so as to ensure that the Restoration Time mentioned in this column is met.

For S1 and S2 incidents, during the time period of this restoration, if the SI is awaiting response from the platform/sub-component OEM/Provider during that waiting period the SI shall also attempt and provide feasible work-around options in order to fully or partly restore services

SLA will be calculated as follows:

- a) In case a severity 1 incident takes place and vendor team identifies and starts working on the problem 20 mins after it has happened, response time is taken as 20 mins. If the system is then restored after 2 hrs then time for resolution is taken to be 2 hrs.
- b) In case of multiple incidences, the highest time for response and resolution will be considered.

8.3 PENALTY FOR SLA’S

Penalty for individual SLA’s is as defined below. All Penalties will be levied on the period of calculation as defined in the respective SLA’s and on the cumulative billing for that period e.g. at the end of the month. All penalties will be additive but total penalty for any period will not exceed 10% of total billing for that period.

KPI: Availability SLA’s

Availability SLA	Performance Slab	Penalty
Critical Sub-system SLA 01	99.89 to 99.75	1%
	99.74 to 99.50	2%
	99.49 to 99.25	4%
	99.24 & 99.00	6%
	Below 99.00	10%

Calculation of availability is referred to in the relevant SLA as example. Penalty for availability will be calculated as below:

If the billing for a given month is Rs. 50,000, and the penalty for critical sub system is on the 99.89 to 99.75 slab then 1% of that month i.e. Rs. 500 will be deducted from that month’s payment.

KPI: Incident Management SLA’s

Response & Restoration	Performance slab	Penalty
Highest Response time, for any Severity	>15 to 20 mins	1%
	>20 to 30 mins	2%
	> 30 mins	3%
Highest Restoration time, Severity 1 incident	>1.5 hrs to 2 hrs	1%
	>2 hrs to 3 hrs	2%
	> 3 hrs	3%
Highest Restoration time, Severity 2 incident	>2 hrs to 3 hrs	1%
	>3 hrs to 4.5 hrs	2%
	> 4.5 hrs	3%
Highest Restoration time, Severity 3 incident	>3.5 hrs to 4.5 hrs	1%
	>4.5 hrs to 6 hrs	2%
	> 6 hrs	3%

Penalty for response and restoration will be calculated as below:

- a) If the billing for a given month is Rs.50,000, and the highest response time is at 27 mins then 2% of that month i.e. Rs.1,000 will be deducted from that month’s payment.
- b) In addition if highest restoration time is 2.5 hrs for severity 1 then an additional 2% i.e. Rs.1,000 will be deducted from that month’s payment. Thus total deduction for that month will be Rs.2,000.

9. SERVICES AND WARRANTY INCLUDING AMC

9.1 SERVICES

- a) All professional services necessary to successfully implement the proposed Software Solution will be part of the RFP/Contract.
- b) Bidder should ensure that key personnel with relevant skill-sets are available to the StockHolding in a timely manner as required for the project.
- c) Bidder should ensure that the quality of methodologies for delivering the services, adhere to quality standards/timelines stipulated therefor.
- d) Bidder shall be willing to transfer skills to relevant personnel from the StockHolding, by means of training and documentation.
- e) Bidder shall provide and implement patches/ upgrades/ updates for hardware/ software/ Operating System / Middleware etc. as and when released by Service Provider/ OEM or as per requirements of the StockHolding. Bidder should bring to notice of the StockHolding all releases/ version changes.
- f) Bidder shall obtain a written permission from the StockHolding before applying any of the patches/ upgrades/ updates. Bidder has to support older versions of the hardware/ software/ Operating System /Middleware etc. in case the StockHolding chooses not to upgrade to latest version.
- g) Bidder shall provide Warranty / AMC for all the components including Hardware/ Software/ Operating System/ Middleware over the entire period of contract from OEM at the bidder's own cost.
- h) All product updates, upgrades & patches shall be provided by the Bidder/ Service Provider free of cost during warranty and AMC/ ATS/ S&S period.
- i) Bidder shall provide legally valid Software Solution. The detailed information on license count and type of license shall also be provided to the StockHolding.
- j) The Bidder shall keep the StockHolding explicitly informed the end of support dates on related products/hardware/firmware and should ensure support during warranty and AMC/ATS/S&S from OEM at the bidder's own cost.

9.2 WARRANTY AND ANNUAL MAINTENANCE CONTRACT (AMC)

- a) The selected Bidder shall provide Warranty / AMC for all the components including Hardware/ Software/ Operating System/ Middleware for the entire period of contract from OEM at the bidder's own cost.
- b) During the warranty and AMC period (if desired), the Bidder will have to undertake
- c) comprehensive support of the Software Solution supplied by the Bidder and all new versions, releases, and updates for all standard software to be supplied to the StockHolding at no additional cost . During the support period, the Bidder shall maintain the Software Solution to comply with parameters defined for acceptance criteria and the Bidder shall be responsible for all costs relating to labour, spares, maintenance (preventive and corrective), compliance of security requirements and transport charges from and to the Site (s) in connection with the repair/ replacement of the Software Solution, which, under normal and proper use and maintenance thereof, proves defective in design, material or workmanship or fails to conform to the specifications, as specified.
- d) During the support period (warranty and AMC), Service Provider shall ensure that services of professionally qualified personnel are available for providing comprehensive on-site maintenance

of the Software Solution and its components as per the StockHolding's requirements. Comprehensive maintenance shall include, among other things, day to day maintenance of the Software Solution as per the StockHolding's policy, reloading of firmware/software, compliance to security and regulatory requirements, etc. when required or in the event of system crash/malfunctioning, arranging and configuring facility as per the requirements of the StockHolding, fine tuning, system monitoring, log maintenance, etc. The Bidder shall provide services of an expert engineer at StockHolding, Navi Mumbai or at any other location wherever required, whenever it is essential. In case of failure of Software Solution, the Bidder shall ensure that Software Solution is made operational to the full satisfaction of the StockHolding within the given timelines.

- e) Warranty/ AMC for the system software/ off-the shelf software will be provided to the StockHolding as per the general conditions of sale of such software.
- f) Support (Warranty/ AMC) would be on-site and comprehensive in nature and must have back to back support from the OEM/Service Provider. Service Provider will warrant products against defects arising out of faulty design etc. during the specified support period.
- g) In the event of system break down or failures at any stage, protection available, which would include the following, shall be specified.
 - h) Diagnostics for identification of systems failures
 - i) Protection of data/ Configuration
 - j) Recovery/ restart facility
 - k) Backup of system software/ Configuration
- l) Prompt support shall be made available as desired in this RFP during the support period at the locations as and when required by the StockHolding.
- m) Bidder support staff should be well trained to effectively handle queries raised by the employees of the StockHolding.
- n) Updated escalation matrix shall be made available to the StockHolding once in each quarter and each time the matrix gets changed.

10. TERMS AND CONDITIONS WITH DETAILS

- a) **Taxes & levies:** Applicable taxes payable at actual as per prevailing rate of taxes as per Government notification. Applicable deduction if any may / will be recovered (deducted) from the payment(s)
- b) **Force Majeure:** Neither the StockHolding nor the Bidder shall be responsible for any failure to fulfil any term or condition of the CONTRACT if and to the extent that fulfilment has been delayed or temporarily prevented by a Force Majeure occurrence, defined as "Force Majeure". For purposes of this clause, "Force Majeure" mean an event beyond the control of the Parties and which prevents a Party from complying with any of its obligations under this Contract, including but not limited to: acts of God not confined to the premises of the Party claiming the Force Majeure, flood, drought, lightning or fire, earthquakes, strike, lock-outs beyond its control, labour disturbance not caused at the instance of the Party claiming Force Majeure, acts of government or other competent authority, war, terrorist activities, military operations, riots, epidemics, civil commotions etc.

The Party seeking to rely on Force Majeure shall promptly, **within 5 days**, notify the other Party of the occurrence of a Force Majeure event as a condition precedent to the availability of this defence with particulars detailed in writing to the other Party and shall demonstrate that it has taken and is taking all reasonable measures to mitigate the events of Force Majeure. And, all Parties will endeavor to agree on an alternate mode of performance in order to ensure the continuity of service and implementation of the obligations of a party under the Contract and to minimize any adverse consequences of Force Majeure. Each PARTY shall bear its own cost in relation to the force majeure occurrence.

However, any failure or lapse on the part of the Bidder to mitigate the damage that may be caused due to the above-mentioned events or the failure to provide adequate disaster management/recovery or any failure in setting up a contingency mechanism would not constitute force Majeure, as set out above.

If the duration of delay exceeds **ninety (90) consecutive or one hundred eighty (180) cumulative days**, StockHolding and the Bidder shall hold consultations with each other in an endeavor to find a solution to the problem. Notwithstanding above, the decision of the StockHolding, shall be final and binding on the bidder.

- c) **Dispute Resolution:** In the event of any dispute arising out of or in connection with this Order, the parties shall use their best endeavour to resolve the same amicably AND if the dispute could not be settled amicably, the matter shall be settled in the court under Mumbai jurisdiction only. The final payment will be released only after the bidder complies with above-mentioned clause
- d) **Right to alter RFP:**
- StockHolding reserves the right to alter the RFP terms and conditions at any time before submission of the bids.
 - StockHolding reserves the right to modify, amend, alter and/or cancel the entire RFP at any stage without assigning any reason whatsoever.

- e) **Integrity Pact:** The bidder will have to enter in to an Integrity Pact with Stock Holding Corporation of India Limited. The format (text) for the Integrity Pact is provided as Annexure-V. The successful bidder will have to submit a signed and stamped copy of the Integrity Pact by the authorized signatory of the successful bidder.
- f) **Sub-Contracting:** No Sub-Contracting is allowed for this RFP.
- g) **Non-Disclosure Agreement (NDA):** The successful bidder will sign a Non-Disclosure Agreement (NDA) with Stock Holding Corporation of India Limited. A Draft NDA is enclosed with this RFP. Acceptance of all clauses mentioned in the NDA (Draft) need to be provided by the bidders along with the Bid.
- h) **Bank Guarantee (BG):** Successful Bidder shall, at own expense, deposit with the StockHolding, within seven (7) days on issuance of PO, a Bank Guarantee (BG) for the value of **Rs. 5 Lakhs** from banks other than co-operative banks. This Bank Guarantee shall be valid up to 90 days beyond the completion of the contract period (Successful Installation followed by 3 years of warranty period).

Bank Guarantee may be discharged / returned by StockHolding upon being satisfied that there has been due performance of the obligations of the Bidder under the contract. However, no interest shall be payable on the Bank Guarantee.

Stockholding reserves the right to invoke the BG in the event of non-performance by the System Integrator/Authorized Distributer/OEM.

ANNEXURE – I: BID FORM AND LETTER OF ACCEPTANCE

[On Company's letter head] (To be included in Technical Bid)

Date: _____

To:

Stock Holding Corporation of India Limited
Plot No. P-51, T.T.C. Industrial Area M.I.D.C.,
Mahape, Kalyan-Shil Road
Navi Mumbai PIN 400710

Dear Sir,

Ref: RFP No. IT-02/2022-23 Date: 14.Jul.2022

We have examined the above RFP, the receipt of which is hereby duly acknowledged and subsequent pre-bid clarifications/ modifications / revisions, if any, furnished by the StockHolding and we offer to supply, Install, Customize, test, commission and support the desired Software Solution detailed in this RFP. We shall abide by the terms and conditions spelt out in the RFP.

- A. While submitting this Bid, we certify that:
- The undersigned is authorized to sign on behalf of the Bidder and the necessary support document delegating this authority is enclosed to this letter.
 - We declare that we are not in contravention of conflict of interest obligation mentioned in this RFP.
 - Commercial bid submitted by us have been arrived at without agreement with any other Bidder of this RFP for the purpose of restricting competition.
 - The Commercial bid submitted by us have not been disclosed and will not be disclosed to any other Bidder responding to this RFP.
 - We have not induced or attempted to induce any other Bidder to submit or not to submit a Bid for restricting competition.
 - We have quoted for all the products/services mentioned in this RFP in our Commercial Bid.
 - The rate quoted in the Commercial Bids are as per the RFP and subsequent pre- Bid clarifications/ modifications/ revisions furnished by the StockHolding, without any exception.
- B. It is further certified that the contents of our Bid are factually correct. We have not sought any deviation to the terms and conditions of the RFP. We also accept that in the event of any information / data / particulars proving to be incorrect, the StockHolding will have right to disqualify us from the RFP without prejudice to any other rights available to the StockHolding.
- C. We certify that while submitting our Bid document, we have not made any changes in the contents of the RFP document, read with its amendments/clarifications provided by the StockHolding.
- D. We agree to abide by all the RFP terms and conditions, contents of Service Levels of this RFP and the rates quoted therein for the orders awarded by the StockHolding up to the period prescribed in the RFP, which shall remain binding upon us.
- E. Till execution of a formal contract, the RFP, along with the StockHolding's notification of award by way of issuance of Purchase Order and our acceptance thereof, would be binding contractual obligation on the StockHolding and us.
- F. We understand that you are not bound to accept the lowest or any Bid you may receive and you may reject all or any Bid without assigning any reason or giving any explanation whatsoever.
- G. We hereby certify that our name does not appear in any "Caution" list of any other regulatory bodies.
- H. We hereby certify that on the date of submission of Bid for this RFP, we do not have any past/

present litigation which adversely affect our participation in this RFP or we are not under any debarment/blacklist period for breach of contract/fraud/corrupt practices by any State Government / Central Government / PSU

- I. We hereby certify that we (participating in RFP as OEM)/ our OEM have a support center and level 3 escalation located in India.
- J. We hereby certify that we have read the clauses contained in O.M. No. 6/18/2019-PPD, dated 23.07.2020 order (Public Procurement No. 1), order (Public Procurement No. 2) dated 23.07.2020 and order (Public Procurement No. 3) dated 24.07.2020 regarding restrictions on procurement from a bidder of a country which shares a land border with India. We further certify that we and our OEM are not from such a country or if from a country, has been registered with competent authority. We certify that we and our OEM fulfil all the requirements in this regard and are eligible to participate in this RFP.
- K. If our Bid is accepted, we undertake to enter into and execute at our cost, when called upon by the StockHolding to do so, a contract in the prescribed form and we shall be solely responsible for the due performance of the contract.
- L. We, further, hereby undertake and agree to abide by all the terms and conditions stipulated by the StockHolding in the RFP document.

Dated this day of20.....
(Signature) (Name)

(In the capacity of)

Duly authorized to sign Bid for and on behalf of

_____ **Seal of the company.**

ANNEXURE – II: BIDDER PROFILE

Sl. No.	Parameters	Response	
1	Name of the Firm/Company		
2	Year of Incorporation in India		
3	Names of the Partners/Directors		
4	Company PAN no		
5	Company GSTN no. (please mention for all states)		
6	Addresses of Firm/Company		
	a) Head Office		
	b) Local Office in Mumbai(if any)		
7	Authorized Contact person		
	a) Name and Designation		
	b) Telephone number		
	c) E-mail ID		
8	Financial parameters		
	Business Results (last three years)	Annual Turnover (Rs. in Crores)	Operating Profit (Rs. in Crores)
	2019-20		
	2020-21		
	2021-22		
	(Only Company figures need to be mentioned not to include group/subsidiary Company figures }	(Mention the above Amount in INR only)	
	Details of Reference Customer		
	Customer Name and Contact No.	Brief Details of hardware supplied	PO number and Date(Attached PO with masked price)
	1		
	2		
3			
4			

N.B. Enclose copies of Audited Balance Sheet along with enclosures

Dated this..... Day of 2022

(Signature)

(In the capacity of)

Duly authorized to sign bid with seal for & on behalf of (Name & Address of the bidder) Note:

- a) Letter of Authorization shall be issued by either Managing Director having related Power of Attorney issued in his favour or a Director of the Board for submission of Response to RFP/ Tender.
- b) All self-certificates shall be duly signed and Stamped by Authorized signatory of the bidder Firm unless specified otherwise.

- c) Bidder response should be complete; Yes/No answer is not acceptable...
- d) Details of clients and relevant contact details are mandatory. Bidder may take necessary approval of the clients in advance before submission of related information. StockHolding will not make any separate request for submission of such information.

ANNEXURE – III: ELIGIBILITY CRITERIA

Documents to be submitted online along with bid

Sr. No	Criteria	Documents to be submitted by bidder	Compliance (Yes/No)
1	Bidder/OEM should be a company registered under the provisions of the Indian Companies Act, 1956/2013 or a partnership firm registered under the Indian Partnership Act, 1936 or the Limited Liability Partnerships Act, 2008. Bidder should be registered with the Tax Authorities	<ul style="list-style-type: none"> For Companies with Indian origin certificate of Incorporation / Registration under Companies Act, 1956/2013. Memorandum and Articles of Association PAN and GST Registration Certificates (GSTIN) 	
2	Bidder/OEM should not be under a declaration of in-eligibility for corrupt, fraudulent or any other unethical business practices and should not be debarred or blacklisted by any State Government / Central Government / PSU for any reason, during previous 5 years from the date of submission of bid.	A self-declaration by authorized signatory on Company letter head	
3	The Bidder/OEM must have an average turnover of minimum Rs. 8 crore (Rupees Eight crore) during last 03 (three) financial year(s) i.e. FY 2021-22, FY 2020-21 and FY 2019-20.	Copy of the audited financial statement for required financial years.	
4	The Bidder/OEM should be profitable organization on the basis of profit before tax (PBT) for at least 02 (two) out of last 03 (three) financial years	Copy of the audited financial statement along with profit and loss statement for corresponding years and / or Certificate of the statutory auditor.	
5	Bidder/OEM should have experience of providing and implementing at least 5 (Five) projects/solution of Contact Centre, 3 (Three) with same OEM, 3 (Three) out of 5 (Five) should be in BFSI sector	Copy of the order and/or Certificate of completion of the work. The Bidder should also furnish user acceptance report.	
6	Client references and contact details (email/ landline/ mobile) of customers for whom the Bidder/OEM has executed similar projects in India. (Start and End Date of the Project to be mentioned) in the past (At least 5 (five) client references are required) out of which at least 3 (Three) should be in BFSI Sector.	Bidder should specifically confirm on their letter head in this regard as per Annexure - II	
7	Certification Requirements : Bidder/OEM should have any valid Security Certification	Copy of the Valid Certificate(s) to be provided	

8	Bidder, if participating as Channel Partner of any OEM, then OEM should have a support center and level 3 escalation located in India. For OEMs, directly participating, the conditions mentioned above for support center remain applicable.	Self-declaration required on Company letter head duly signed by authorized signatory	
9	Bidder/OEM should have at least 1500 (One thousand five hundred) current Number of seats (active licenses) supported through technology solutions for Contact Center Processes overall in India.	Certificate from the referenced client on the Client’s letterhead certifying the fulfillment of the criteria.	
10	Bidder to be certified channel partner of the OEM. For OEMs, directly participating, the condition is not applicable.	MAF from OEM is required. If OEM directly participating, self-Certification is required on Company letter head duly signed by authorized signatory	
11	<p>Bidder/OEM need to certify that they have read the clauses contained in O.M. No. 6/18/2019-PPD, dated 23.07.2020 order (Public Procurement No. 1), order (Public Procurement No. 2) dated 23.07.2020 and order (Public Procurement No. 3) dated 24.07.2020 regarding restrictions on procurement from a bidder of a country which shares a land border with India.</p> <p>Bidder also to certify that bidder and OEM are not from such a country or if from a country, has been registered with competent authority.</p>	Self-declaration required on Company letter head	
12	Bidder/OEM to abide by labor laws, human rights and regulations in their regions of business. Bidder to adhere to laws addressing child, forced or trafficked labor	Self-declaration from bidder on their letter head duly signed by authorized signatory	
13	Bidder / OEM shall provide the required solution to be hosted in India Data Centre.	Certification from Cloud Service Provider providing relevant servers hosting the platform is present in India. Self-Certification from OEM ensuring that the platform is hosted on the same servers.	

ANNEXURE – IV: TECHNICAL BID

The bidder is required to submit a response along with solution document by responding to the above requirements with “Yes” or “No” against them (bidder to add additional column “Compliance (YES/NO)” to each requirement). The same should be submitted along with the bid documents, for the purposes of evaluation in a manner that fulfils the following conditions:

The response must:

- a) Be submitted as a PDF, Word, or PPT presentation. Further, specific sections of the response may be submitted as an Excel sheet or other commonly used format that can be viewed by the StockHolding. StockHolding reserves the right to request clarifications or change of format in response in case submitted response document is not sufficiently clear or cannot be opened/read.
- b) Contain details of how the response/proposed solution meets the features required in the RFP in appropriate level of detail
 - A section/table should be present to show the mandatory requirements being fulfilled with reference to components in the solution document fulfilling them,
 - A section/table should be present to show how many good-to-have requirements are fulfilled with reference to components in the solution document fulfilling them,
 - A section/table on additional capabilities if any
- c) Call out explicitly any assumptions made for creation of the solution - both those given in RFP, or made outside the details given RFP
- d) Clearly specify what is needed beyond what is explicitly mentioned from StockHolding and its linkage with proposed solution – in both quantity and specifications
- e) Specify the quantity of resources to be provided by the StockHolding – including but not limited to physical space, bandwidth or any other requirements
- f) Detail the support structure for managed services such indicative number of people at site, skillset of people
 - Details of high level supervisory/management staff proposed for the project including their experience
- g) Specify monitoring and ticketing tools for support services to be provided
- h) Detailed project timelines and governance with both OEM and SI resources to enable meeting of timelines given in RFP

Any other clarifications or details as requested by the StockHolding

ANNEXURE – V: COMMERCIAL BID FORMAT

Contact Centre Solution			
Specifications	Unit Price (INR)	Total Price (INR)	Frequency {Upfront (One Time) / Recurring}
Contact Centre Solution Cloud – Platform Cost			
Contact Centre Solution Cloud – License Cost per agent or branch or Virtual number or based on OEM nomenclature (XXX is count of licenses)			
Contact Centre Solution Cloud – Virtual Number Cost			
Incoming Call Charges per second (for evaluation 600,000 minutes will be considered)			
Outgoing Call Charges per second (for evaluation 300,000 minutes will be considered)			
SMS charges per message (incoming) (for evaluation 1000 SMS will be considered)			
SMS charges per message (outgoing) (for evaluation 1000 SMS will be considered)			
SMS Gateway charge			
Per Man day cost for any customization			
Cost of Service Integration (CRM, SMS Gateway, CNT/TCS FO)			
Cost of Resident Engineer (RE) / Dedicated Support / month			
Any Other Cost			
Total (INR)			

Vendor should provide the details terms & condition along with the applicable taxes %.

- a) All prices quoted should be excluding applicable Taxes
- b) The quantity provided herewith is to ease vendors to arrive at unit cost for each slab.
- c) The above numbers may vary (decrease/increase) basis business requirement.
- d) Licenses will be placed on actual business demand basis.
- e) Onboarding Resident Engineer services is at the sole discretion of StockHolding
- f) Clearly highlight whether the cost break-up is a monthly recurring cost or upfront / one-time cost

ANNEXURE – VI: COVERING LETTER

(To be executed on plain paper and submitted only by the successful bidder)

(_____ Name of the Department / Office) RFP No IT-02/2022-23
dated 14.Jul.2022 for _____

This pre-bid pre-contract Integrity Pact (Agreement) (hereinafter called the Integrity Pact) (IP) is made on _____ day of the _____, between, on one hand, StockHolding ., a company incorporated under Companies Act, 1956, with its Registered Office at 301, Centre Point Building, Dr. Babasaheb R. Ambedkar Road, Parel, Mumbai – 400012 , acting through its authorized officer, (hereinafter called Principal), which expression shall mean and include unless the context otherwise requires, his successors in office and assigns) of the First Part And M/s. _____

_____ (with complete address and contact details) represented by Shri _____ (i.e. s (bidders) hereinafter called the 'Counter Party') which expression shall mean and include , unless the context otherwise requires, his successors and permitted assigns) of the Second Part.

AND WHEREAS the PRINCIPAL/Owner values full compliance with all relevant laws of the land, rules, regulations economic use of resources and of fairness/transparency in its relation with Bidder(s) /Contractor(s)/Counter Party(ies).

AND WHEREAS, in order to achieve these goals, the Principal/Owner has appointed Independent External Monitors (IEM) to monitor the Tender (RFP) process and the execution of the Contract for compliance with the principles as laid down in this Agreement.

WHEREAS THE Principal proposes to procure the Goods/services and Counter Party is willing to supply/has promised to supply the goods OR to offer/has offered the services and WHEREAS the Counter Party is a private Company/Public Company/Government Undertaking/ Partnership, constituted in accorded with the relevant law in the matter and the Principal is a Government Company performing its functions as a registered Public Limited Company regulated by Securities Exchange Board of India. NOW THEREFORE, To avoid all forms of corruption by following a system that is fair, transparent and free from any influence prejudiced dealings prior to, during and subsequent to the tenor of the contract to be entered into with a view to “- Enabling the PRINCIPAL to obtain the desired goods/services at competitive price in conformity with the defined specifications by avoiding the high cost and the distortionary impact of corruption on public procurement, and Enabling the Counter Party to abstain from bribing or indulging in any type of corrupt practice in order to secure the contract by providing assurance to them that their competitors will also abstain from bribing and other corrupt practices and the PRINCIPAL will commit to prevent corruption, in any form, by its officials by following transparent procedures. The parties hereto hereby agree to enter into this Integrity Pact and agree as follows:

I. Commitment of the Principal / Buyer

A. The Principal Owner commits itself to take all measures necessary to prevent corruption and to observe the following principles:-

- a) No employee of the Principal/Owner, personally or through any of his/her family members, will in connection with the Tender (RFP) or the execution of the contract, procurement or services/goods, demand, take a promise for or accept for self or third person, any material or immaterial benefit which the person not legally entitled to.

- b) The Principal/Owner will, during the Tender (RFP) Process treat all Bidder(s)/Counter Party(ies) with equity and reason. The Principal / Owner will, in particular, before and during the Tender (RFP) Process, provide to all Bidder(s) / Counter Party(ies) the same information and will not provide to any Bidder(s)/Counter Party(ies) confidential / additional information through which the Bidder(s)/Counter Party(ies) could obtain an advantage in relation to the Tender (RFP) Process or the Contract execution.
 - c) The Principal / Owner shall endeavour to exclude from the Tender (RFP) process any person, whose conduct in the past been of biased nature.
- B. If the Principal / Owner obtains information on the conduct of any of its employees which is a criminal offence under the Indian Penal Code (IPC) / Prevention of Corruption Act, 1988 (PC Act) or is in violation of the principles herein mentioned or if there is a substantive suspicion in this regard, the Principal / Owner / StockHolding will inform the Chief Vigilance Officer through the Vigilance Officer and in addition can also initiate disciplinary actions as per its internal laid down policies and procedures.

II. Commitments of Counter Parties/Bidders

- a) The Counter Party commits itself to take all measures necessary to prevent corrupt practices, unfair means and illegal activities during any stage of bid or during any pre-contract stage in order to secure the contract or in furtherance to secure it and in particular commit itself to the following. Counter Party (ies) / Bidders commits himself to observe these principles during participation in the Tender (RFP) Process and during the Contract execution.
- b) The Counter Party will not offer, directly or through intermediaries, any bribe, gift, consideration, reward, favour, any material or immaterial benefit or other advantage, commission, fees, brokerage or inducement to any official of the PRINCIPAL, connected directly or indirectly with the bidding process, or to any person organization or third party related to the contract in exchange for any advantage in the bidding, evaluation, contracting and implementation of the contract.
- c) The Counter Party further undertakes that it has not given, offered or promised to give directly or indirectly any bribe, gift, consideration, reward, favour, any material or immaterial benefit or other advantage, commission, fees, brokerage or inducement to any official of the Principal / StockHolding or otherwise in procurement the Contract or forbearing to do or having done any act in relation to the obtaining or execution of the contract or any other contract with the Principal / StockHolding for forbearing to show favour or disfavour to any person in relation to the contract or any other contract with the Principal / StockHolding.
- d) Bidder / Counter Party shall disclose the name and address of agents and representatives, if any, handling the procurement / service contract.
- e) Bidder / Counter Party shall disclose the payments to be made by them to agents / brokers; or any other intermediary if any, in connection with the bid / contract.
- f) The Bidder / Counter Party has to further confirm and declare to the Principal / StockHolding that the Bidder / Counter Party is the original integrator and has not engaged any other individual or firm or company, whether Indian or foreign to intercede, facilitate or in any way to recommend to Principal / StockHolding or any of its functionaries whether officially or unofficially to the award of the contract to the Bidder / Counter Party nor has any amount been paid, promised or intended to be paid to any such individual, firm or company in respect of any such intercession, facilitation or recommendation.
- g) The Bidder / Counter Party has to submit a Declaration along with Technical Bid, as given at Annexure 6. If bids are invited through a Consultant a Declaration has to be submitted along with the Technical Bids as given at Annexure.
- h) The Bidder / Counter Party, either while presenting the bid or during pre- contract negotiation or before signing the contract shall disclose any payments made, is committed to or intends to make to officials of StockHolding /Principal, or their family members, agents, brokers or any other intermediaries in connection with the contract and the details of services agreed upon for such

payments.

- i) The Bidder / Counter Party will not collude with other parties interested in the contract to impair the transparency, fairness and progress of bidding process, bid evaluation, contracting and implementation of the Contract.
- j) The Bidder / Counter Party shall not accept any advantage in exchange for any corrupt practice, unfair means and illegal activities.
- k) The Bidder shall not use improperly, for purposes of competition or personal gain, or pass on to others, any information provided by the Principal / StockHolding as part of the business relationship, regarding plans, technical proposals and business details, including information contained in any electronic data carrier. The Bidder / Counter Party also Undertakes to exercise due and adequate care lest any such information is divulged.
- l) The Bidder / Counter Party commits to refrain from giving any complaint directly or through any other manner without supporting it with full and verifiable facts.
- m) The Bidder / Counter Party shall not instigate or cause to instigate any third person including their competitor(s) of bidding to commit any of the actions mentioned above.
- n) If the Bidder / Counter Party or any employee of the Bidder or any person acting on behalf of the Bidder / Counter Party, either directly or indirectly, is a relative of any of the official / employee of Principal / StockHolding, or alternatively, if any relative of an official / employee of Principal /
- o) StockHolding has financial interest / stake in the Bidder's / Counter Party firm, the same shall be disclosed by the Bidder / Counter Party at the time of filing of tender (RFP).
- p) The term `relative` for this purpose would be as defined in Section 2 Sub Section 77 of the Companies Act, 2013.
- q) The Bidder / Counter Party shall not lend to or borrow any money from or enter into any monetary dealings or transactions, directly or indirectly, with any employees / officials of the Principal / StockHolding
- r) The Bidder / Counter Party declares that no previous transgression occurred in the last three years immediately before signing of this IP, with any other Company / Firm/ PSU/ Departments in respect of any corrupt practices envisaged hereunder that could justify Bidder / Counter Party exclusion from the Tender (RFP) Process.
- s) The Bidder / Counter Party agrees that if it makes incorrect statement on this subject, Bidder / Counter Party can be disqualified from the tender (RFP) process or the contract, if already awarded, can be terminated for such reason.

III. Disqualification from Tender (RFP) Process and exclusion from Future Contracts

- a) If the Bidder(s) / Contractor(s), either before award or during execution of Contract has committed a transgression through a violation of Article II above or in any other form, such as to put his reliability or credibility in question, the Principal / StockHolding is entitled to disqualify the Bidder / Counter Party / Contractor from the Tender (RFP) Process or terminate the Contract, if already executed or exclude the Bidder / Counter Party / Contractor from future contract award processes. The imposition and duration of the exclusion will be determined by the severity of transgression and determined by Principal / StockHolding. Such exclusion may be for a period of 1 year to 3 years as per the procedure prescribed in guidelines of the Principal / StockHolding.
- b) The Bidder / Contractor / Counter Party accepts and undertake to respect and uphold the Principal / StockHolding's absolute right to resort to and impose such exclusion.
- c) Apart from the above, the Principal / StockHolding may take action for banning of business dealings / holiday listing of the Bidder / Counter Party / Contractor as deemed fit by the Principal / Owner / StockHolding.
- d) The Bidder / Contractor / Counter Party can prove that it has resorted / recouped the damage caused and has installed a suitable corruption prevention system, the Principal / Owner/ StockHolding may at its own discretion, as per laid down organizational procedure, revoke the exclusion prematurely.

IV. Consequences of Breach Without prejudice to any rights that may be available to the Principal /

StockHolding / Owner under Law or the Contract or its established policies and laid down procedure, the Principal / StockHolding / Owner shall have the following rights in case of breach of this Integrity Pact by the Bidder / Contractor(s) / Counter Party:-

- a) Forfeiture of EMD / Security Deposit : If the Principal / StockHolding / Owner has disqualified the Bidder(s)/Counter Party(ies) from the Tender (RFP) Process prior to the award of the Contract or terminated the Contract or has accrued the right to terminate the Contract according to the Article III, the Principal / StockHolding / Owner apart from exercising any legal rights that may have accrued to the Principal / StockHolding / Owner, may in its considered opinion forfeit the Earnest Money Deposit / Bid Security amount of the Bidder / Contractor / Counter Party.
- b) Criminal Liability: If the Principal / Owner / StockHolding obtains knowledge of conduct of a Bidder / Counter Party / Contractor, or of an employee of a representative or an associate of a Bidder / Counter Party / Contractor which constitute corruption within the meaning of PC Act, or if the Principal / Owner / StockHolding has substantive suspicion in this regard, the Principal / StockHolding / Owner will inform the same to the Chief Vigilance Officer through the Vigilance Officer.

V. Equal Treatment of all Bidders/Contractors / Subcontractors / Counter Parties

- a) The Principal / StockHolding / Owner will enter into Pacts on identical terms as this one with all Bidders / Counterparties and Contractors.
- b) The Principal / StockHolding / Owner will disqualify Bidders / Counter Parties / Contractors who do not submit, the duly signed Pact, between the Principal / Owner / StockHolding and the Bidder/Counter Parties, along with the Tender (RFP) or violate its provisions at any stage of the Tender (RFP) process, from the Tender (RFP) process.

VI. Independent External Monitor (IEM)

- a) The Principal / Owner / StockHolding has appointed competent and credible Independent External Monitor (s) (IEM) for this Pact. The task of the Monitor is to review independently and objectively, whether and to what extent the parties comply with the obligations under this Integrity Pact.
- b) The IEM is not subject to instructions by the representatives of the parties and performs his functions neutrally and independently. He reports to the Chief Executive Officer and Managing Director, Stock Holding Corporation of India Limited.
- c) The Bidder(s)/Contractor(s) / Counter Party(ies) accepts that the IEM has the right to access without restriction, to all Tender (RFP) documentation related papers / files of the Principal / StockHolding / Owner including that provided by the Contractor(s) / Bidder / Counter Party. The Counter Party / Bidder / Contractor will also grant the IEM, upon his request and demonstration of a valid interest, unrestricted and unconditional access to his Tender (RFP) Documentation / papers / files. The IEM is under contractual obligation to treat the information and documents of the Bidder(s) / Contractor(s) / Counter Party (ies) with confidentiality.
- d) In case of tender (RFP)s having value of 5 crore or more, the Principal / StockHolding / Owner will provide the IEM sufficient information about all the meetings among the parties related to the Contract/Tender (RFP) and shall keep the IEM apprised of all the developments in the Tender (RFP) Process.
- e) As soon the IEM notices, or believes to notice, a violation of this Pact, he will so inform the Management of the Principal / Owner /StockHolding and request the Management to discontinue or take corrective action, or to take other relevant action. The IEM can in this regard submit non-binding recommendations. Beyond this, the IEM has no right to demand from the parties that they act in a specific manner, refrain from action or tolerate action.
- f) The IEM will submit a written report to the CEO&MD, StockHolding. Within 6 to 8 weeks from the date of reference or intimation to him by the Principal / Owner / StockHolding and should the occasion arise, submit proposals for correcting problematic situations.
- g) If the IEM has reported to the CEO&MD, StockHolding Ltd. a substantiated suspicion of an offence under the relevant IPC/PC Act, and the CEO & MD, StockHolding has not within reasonable time

taken visible action to proceed against such offence or reported it to the Chief Vigilance Officer, the IEM may also transmit the information directly to the Central Vigilance Officer. 8. The word 'IEM' would include both singular and plural.

VII. Duration of the Integrity Pact (IP)

This IP begins when both the parties have legally signed it. It expires for the Counter Party / Contractor / Bidder, 12 months after the completion of work under the Contract, or till continuation of defect liability period, whichever is more and for all other Bidders, till the Contract has been awarded. If any claim is made / lodged during the time, the same shall be binding and continue to be valid despite the lapse of this Integrity Pact as specified above, unless it is discharged / determined by the CEO&MD Stock Holding VIII. VIII. Other Provisions

- a) This IP is subject to Indian Law, place of performance and jurisdiction is the Head Office / Regional Offices of the Stockholding /Principal / Owner who has floated the Tender (RFP).
- b) Changes and supplements in any Procurement / Services Contract / Tender (RFP) need to be made in writing. Change and supplement in IP need to be made in writing.
- c) If the Contractor is a partnership or a consortium, this IP must be signed by all the partners and consortium members. In case of a Company, the IP must be signed by a representative duly authorized by Board resolution.
- d) Should one or several provisions of this IP turn out to be invalid; the remainder of this Pact remains valid. In this case, the parties will strive to come to an agreement to their original intentions.
- e) Any dispute or difference arising between the parties with regard to the terms of this Agreement / Pact, any action taken by the Principal / Owner / Stock Holding in accordance with this Agreement / Pact or interpretation thereof shall not be subject to arbitration.

IX. Legal and Prior Rights

All rights and remedies of the parties hereto shall be in addition to all the other legal rights and remedies belonging to such parties under the Contract and / or law and the same shall be deemed to be cumulative and not alternative to such legal rights and remedies aforesaid. For the sake of brevity, both the Parties agrees that this Pact will have precedence over the Tender (RFP) / Contract documents with regard to any of the provisions covered under this Integrity Pact.

IN WITNESS WHEREOF the parties have signed and executed this Integrity Pact (IP) at the place and date first above mentioned in the presence of the following witnesses:-

(For and on behalf of Principal / Owner / *Stock Holding*)

(For and on behalf of Bidder / Counter Party / Contractor)

WITNESSES:

- 1. _____ (Signature, name and address)
- 2. _____ (Signature, name and address)

Note: In case of Purchase Orders wherein formal agreements are not signed references to witnesses may be deleted from the past part of the Agreement.

ANNEXURE – VII: DECLARATION

Covering Letter on Vendor Letterhead (Annexure-IV of Integrity Pact)

Ref: IT-02/2022-23 Date: 14.Jul.2022

To,

Sub: RFP for Cloud Contact Centre Software

Sir,

DECLARATION

Stock Holding Corporation of India Limited (Stock Holding) hereby declares that Stock Holding has adopted Integrity Pact (IP) Program as advised by Central Vigilance Commission vide its Letter No. 015/VG:/012-276469 dated February 25, 2015 and stands committed to following the principles of transparency, equity and competitiveness in public procurement. The subject Notice Inviting Tender (RFP) (NIT) is an invitation to offer made on the condition that the Bidder will sign the Integrity Agreement, which is an integral part of tender (RFP) documents, failing which the tenderer (RFP) / bidder will stand disqualified from the tendering (RFP) process and the bid of the bidder would be summarily rejected. This Declaration shall form part and parcel of the Integrity Agreement and signing of the same shall be deemed as acceptance and signing of the Integrity Agreement on behalf of the Stock Holding.

Yours faithfully,

For and on behalf of Stock Holding Corporation of India Limited (Authorized Signatory)

ANNEXURE – VIII: COMPLIANCE STATEMENT

(To be submitted along with Technical Bid)

Subject: RFP for Cloud Contact Centre Software

DECLARATION

We understand that any deviations mentioned elsewhere in the bid will not be considered and evaluated by StockHolding. We also agree that StockHolding reserves its right to reject the bid, if the bid is not submitted in proper format as per subject RFP.

Sr. No.	Item / Clause of the RFP	Compliance (Yes / No)
1	Objective of the RFP	
2	Eligibility Criteria	
3	Service Level Agreement (SLA) / Scope of Work	
4	Non-Disclosure Agreement	
5	Payment Terms	
6	Bid Validity, Order Cancellation, Exit Clause	
7	Right to alter RFP	
8	No Commitment to Accept Lowest or Any Other Bid (RFP)	
9	Force Majeure	
10	Integrity Pact	
11	All General & Other Terms & Conditions in the RFP	
12	Mandatory Requirements (Section 6.1.1)	
13	Bid Formats (Technical & Commercial Bid)	
14	Annexures in the RFP	
15	Pre-Bid Meeting	
16	Workflow Diagram Requirement and Process Flow	

Date:

Signature with seal

Name & Designation:

ANNEXURE – IX: STATEMENT OF DEVIATION FROM REQUIREMENT

(To be submitted along with Technical Bid)

Subject: RFP for Cloud Contact Centre Software

There are no technical deviations (null deviations) from the requirement Specifications and Work-Flow diagram. The entire work shall be performed as per your specifications and documents.

OR (Strike out whatever is not applicable)

Following is the exhaustive list of technical deviations and Work-Flow diagram from the requirement specifications. Except for these deviations and variations, the entire work shall be performed as per your specifications and documents.

Sl. No.	Section No.	Page No.	Statement of deviations and variations	Justification
1.				
2.				

Date:

Signature with seal

Name & Designation:

ANNEXURE – X: PRE-BID QUERY FORMAT FOR BIDDER/OEM

RFP Reference Number: IT-02/2022-23 Date: 14.Jul.2022

Serial Number	RFP Heading	Section	Page Number	Pre-bid Query	Change Requested	Justification for Change
1						
2						
3						
4						

ANNEXURE – XI: DRAFT NDA

MUTUAL NON-DISCLOSURE AGREEMENT

This Non-Disclosure Agreement (hereinafter “Agreement”) is executed on this _____ day of _____, 2022 by and between

Stock Holding Corporation of India Limited, a company incorporated under the Companies Act, 1956 and having its registered office at 301, Centre Point, Dr. Babasaheb Ambedkar Road, Parel, Mumbai 400012 (hereinafter referred to as “StockHolding” which expression shall mean and include its successors and assigns), of the One Part;

And

(Company Name) a company incorporated under the Companies Act, 1956 and having its registered office / corporate office at (Complete address) (hereinafter referred to as “Company Name” which expression shall mean and include its successors and assigns), of the Other Part.

(StockHolding and (Company Name) are individually referred to as ‘Party’ and collectively as ‘Parties’.)

The Party disclosing Confidential Information under this Agreement shall be referred to as Disclosing Party and the Party receiving Confidential Information shall be referred to as Receiving Party.

Purpose: Whereas, the Parties wish to explore possible business opportunity, during which either Party will be required to disclose certain Confidential Information to the other.

Confidential Information and Exclusions: Confidential Information shall mean and include (a) any information received by the Receiving Party which is identified by Disclosing Party as confidential or otherwise; (b) all information including technical, data security, cyber security business, financial and marketing information, data, analysis, compilations, notes, extracts, materials, reports, drawings, designs, specifications, graphs, layouts, plans, charts, studies, memoranda or other documents, know-how, ideas, concepts, strategies, trade secrets, product or services, results obtained by using confidential information, prototype, client or vendor list, projects, employees, employees skills and salaries, future business plans disclosed by Disclosing Party whether orally or as embodied in tangible materials. Confidential Information shall however exclude any information which a) is in the public domain; (b) was known to the Party of such disclosure or becomes known to the Party without breach of any confidentiality agreement; (c) is independently developed by the Party without use of Confidential Information disclosed herein; (d) is disclosed pursuant judicial order or requirement of the governmental agency or by operation of law, provided that the recipient party gives disclosing party a written notice of any such requirement within ten (10) days after the learning of any such requirement, and takes all reasonable measure to avoid disclosure under such requirement.

Confidentiality Obligations: The Receiving Party shall, at all times maintain confidentiality and prevent disclosure of Confidential Information of Disclosing party with at least the same degree of care as it uses

to protect its own confidential information but in no event with less than reasonable care. The Receiving Party shall keep the Confidential Information and Confidential Materials and any copies thereof secure and in such a way so as to prevent unauthorized access by any third party. The Receiving Party agrees not to disclose, transmit, reproduce or make available any such Confidential Information to any third parties and shall restrict disclosure of Confidential Information only to a limited group of Recipient's directors, concerned officers, employees, attorneys or professional advisors who need to have access to the Confidential Information for the purposes of maintaining and supporting the services and each of whom shall be informed by Receiving Party of the confidential nature of Confidential Information and agree to observe the same terms and conditions set forth herein as if specifically named a Party hereto. The Receiving Party shall not, unless otherwise agreed herein, use any such Confidential Information and Confidential Materials for its own benefit or the benefit of others or do anything prejudicial to the interests of the Disclosing Party or its customers or their projects. The Receiving Party shall not use the Confidential Information in any way to create a derivative work out of it or reverse engineer or use for any commercial purpose or for any purpose detrimental to the Disclosing Party. The Receiving Party shall not make copies of Confidential Information unless the same are reasonably necessary. The Receiving Party shall immediately notify Disclosing Party in the event of any unauthorized use or disclosure of the Confidential Information and reasonably support Disclosing Party in taking necessary remedial action.

No Warranty: All Confidential Information is provided 'as is.' Neither Party makes any warranty, express, implied or otherwise, regarding its accuracy, completeness or performance.

No License: Each Party recognizes that nothing in this Agreement is construed as granting it any proprietary rights, by license or otherwise, to any Confidential Information or to any intellectual property rights based on such Confidential Information.

Return:

The Receiving Party who receives the Confidential Information and Confidential Materials agrees that on receipt of a written demand from the Disclosing Party:

Immediately return all written Confidential Information, Confidential Materials and all copies thereof provided to, or produced by it or its advisers, as the case may be, which is in Receiving Party's possession or under its custody and control; (SUCH RETURN OF DOCUMENTS SHOULD BE DONE BY SIGNING A LETTER).

To the extent practicable, immediately destroy all analyses, compilations, notes, studies, memoranda or other documents prepared by it or its advisers to the extent that the same contain, reflect or derive from Confidential Information relating to the Disclosing Party;

So far as it is practicable to do so immediately expunge any Confidential Information relating to the Disclosing Party or its projects from any computer, word processor or other device in its possession or under its custody and control; and

To the extent practicable, immediately furnish a certificate signed by its director or other responsible representative confirming that to the best of his/her knowledge, information and belief, having made all proper enquiries the requirements of this paragraph have been fully complied with.

Receiving party will attempt to maintain, to the best possible extent, physical and logical segregation of the

Confidential Information of the data of the Receiving party from data of any third party.

Term: The term of this Agreement shall be __(__) years from _____(the Effective Date). Either Party may terminate this Agreement by giving a thirty (30) days written notice to the other. The confidentiality obligations stated in this Agreement shall survive for a period of three (3) years from the date of termination or expiration of this Agreement.

Remedies: The Confidential Information and Confidential Materials and all copies thereof, in whatsoever form shall at all times remain the property of the Disclosing Party and its disclosure hereunder shall not confer on the Receiving Party any rights whatsoever beyond those contained in this document.

The Parties acknowledge and agree that the Disclosing Party will suffer substantial and irreparable damage, not readily ascertainable or compensable in monetary terms, in the event of any breach of any provision of this Agreement by the Receiving Party. The Receiving Party therefore agrees that, in the event of any such breach, the Disclosing Party shall be entitled, without limitation of any other remedies otherwise available to it, to obtain an injunction or other form of equitable relief from any court of competent jurisdiction.

Governing Law and Jurisdiction: This Agreement may be governed and construed in accordance with the laws of India and shall be subject to the jurisdiction of courts in Mumbai, India.

Miscellaneous: This Agreement constitutes the entire agreement between the Parties with respect to the subject matter hereof and supersedes all prior commitments/ understanding in this regard and may not be amended or modified except by a writing signed by a duly authorized representative of the respective Parties. This Agreement may be executed in several counterparts (physical or electronic form), each of which shall be deemed an original, but all of which together shall constitute one and the same instrument. This Agreement may not be assigned or transferred except by a mutual written consent of both the Parties.

For Stock Holding Corporation of India Limited	For (Company Name)
Name:	Name:
Title:	Title:
In the Presence of	
Name:	Name:
Title:	Title: