

**REQUEST FOR PROPOSAL (“RFP”)
for
Facility Management Services (FMS) & Annual Maintenance Contract (AMC) support for
PCs, Laptops, Printers, Scanners with Centralized IT Service Desk, Remote Support
Management & Mobile devices Support for IT Assets of SBI Life along with Onsite Resident
Engineer Support at SBI Life’s Regional offices**

RFP No: SBIL/2024-25/DIG/008 Dated 10/01/2025

Confidentiality – All information included in this RFP and contained in any subsequent communication/s is confidential and is intended only for the recipient’s knowledge. No information included in this document or any subsequent communications connected to it can be disclosed to any third party. Receipt and viewing of this document imply acceptance of the above confidentiality norm.

SBI LIFE INSURANCE COMPANY LTD., having its registered office at “Natraj”, M. V. Road & Western Express Highway Junction, Andheri (East), – Mumbai 400 069 and its Central Processing Centre at 8th Level Seawoods Grand Central, Tower 2, Plot No R-1, Sector 40, Seawoods, Nerul Node, Navi Mumbai- 400706.

Schedule of Events

Sl No	Particulars	Remarks
1	Contact details of issuing department	<p>Department Name: Digital Infra, IT Email ID: RFP@sbilife.co.in</p> <p>Contact Address: SBI Life Insurance Company Limited 1 Floor, Kapas Bhavan, CBD Belapur, Navi Mumbai – 400 614</p>
2	Bid Document availability including changes/amendments, if any issued	<p>The RFP document may be downloaded from SBI Life's website https://www.sbilife.co.in/en/services/download-center/rfp-forms from 10/01/2025</p>
3	Last date for requesting clarification	<p>Upto 18:00 hrs on 18/01/2025 All communications regarding points / queries requiring clarifications shall be provided in writing by e-mail to email ID RFP@sbilife.co.in.</p>
4	Pre- Bid Meeting and Venue	<p>at: SBI Life Insurance Company Ltd. and also over virtual meeting on teams (meeting invite and time will be communicated separately).</p>
5	Clarifications to queries raised will be provided by the SBIL.	On 21/01/2025 During the pre-bid meeting
6	Last date and time for Bid submission	Upto 18:00 hrs. on 25/01/2025
7	Address for submission of Bids	<p>AVP IT Support SBI Life Insurance Co Ltd, 1st floor, Kapas Bhavan, CBD Belapur Navi Mumbai. Pin: 400614</p>
8	Date and Time of opening of Technical Bids	Authorized representatives of Bidders may be present online during opening of the Technical Bids. However, Bids would be opened even in the absence of Bidder representatives.
9	Opening of Commercial Bids	Commercial Bid of technically qualified Bidders only will be opened on a subsequent date.

10	Earnest Money Deposit ("EMD")	Bidders must submit an EMD amounting to INR 5,00,000/- (Rupees Five Lakh Only) through a Demand Draft drawn from a Nationalized / Scheduled Bank, in favor of SBI Life Insurance Company Ltd. at the time of Bid submission.
11	Performance Bank Guarantee ("BG")	Selected/Successful Bidder must among other requisites, submit a performance BG equivalent to 10% of the Total Project Cost favoring SBI Life Insurance Company Ltd. issued by a Nationalized/Scheduled Commercial Bank

Part-I

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ABOUT SBI LIFE INSURANCE CO. LTD.

SBI Life Insurance Co. Ltd. (referred herein as 'SBI Life' / 'SBIL' / 'the Company'), one of the most trusted life insurance companies in India, was incorporated in October 2000 and is registered with the Insurance Regulatory and Development Authority of India (IRDAI) in March 2001.

Serving millions of families across India, SBI Life's diverse range of products caters to individuals as well as group customers through Protection, Pension, Savings and Health solutions.

Driven by 'Customer-First' approach, SBI Life places great emphasis on maintaining world class operating efficiency and providing hassle-free claim settlement experience to its customers by following high ethical standards of service. Additionally, SBI Life is committed to enhance digital experiences for its customers, distributors and employees alike.

SBI Life strives to make insurance accessible to all, with its extensive presence across the country through its 1,082 offices, 24,939 employees, a large and productive network of about 264,058 agents, 79 corporate agents and 14 bancassurance partners with more than 41,000 partner branches, 140 brokers and other insurance marketing firms.

In addition to doing what's right for the customers, the Company is also committed to provide a healthy and flexible work environment for its employees to excel personally and professionally.

SBI Life strongly encourages a culture of giving back to the society and has made substantial contribution in the areas of child education, healthcare, disaster relief and environmental upgrade. In 2023-24, the Company touched over 1.05 lakh direct beneficiaries through various CSR interventions.

Listed on the Bombay Stock Exchange ('BSE') and the National Stock Exchange ('NSE'), the company has an authorized capital of ` 20.0 billion and a paid-up capital of ` 10.0 billion. The AuM is ` 4,389.5 billion.

For more information, please visit our website-www.sbilife.co.in and connect with us on Facebook, Twitter, YouTube, Instagram, and LinkedIn.

(Numbers & data mentioned above are for the period ended September 30, 2024)

1. INVITATION TO BID:

This Request for Proposal ('RFP') has been issued by SBIL for **FMS & AMC** for PCs, Laptops, Printers and scanners. Remote Support Management for IT Assets under AMC & Warranty, Remote Support Engineers and Mobile devices Support & Onsite Resident Engineers in SBI Life Regional offices for a period of 5 years with pro rata inclusion of assets which will move from warranty to AMC support.

- i. In order to meet the requirements, SBIL solicits offer from reputed Companies as per details/scope of work mentioned in **Appendix-E** of this RFP.
- ii. Bidder shall mean anybody corporate or entity (i.e. juridical person) who meets the eligibility criteria given in **Appendix-B** of this RFP and willing to provide the Services as required in this RFP. The interested Bidders who agree to all the terms and conditions contained in this RFP may submit their Bids with the information desired in this RFP. Consortium bidding is not permitted under this RFP.
- iii. Address for submission of Bids, contact details including email address for sending communications are given in Schedule of Events of this RFP.
- iv. The purpose of this RFP is to seek a detailed technical and commercial proposal for FMS IT Asset AMC and Warranty services as desired in this RFP.
- v. This RFP document shall not be transferred, reproduced or otherwise used for purpose other than for which it is specifically issued.
- vi. Interested Bidders are advised to go through the entire RFP before submission of Bids to avoid any chance of elimination. The Interested Bidders desirous of providing Services to SBIL are invited to submit their technical and commercial proposal in response to this RFP. The criteria and the actual process of evaluation of the responses to this RFP and subsequent selection of the successful Bidder will be as outlined in this RFP and shall always be entirely at SBIL's discretion. This RFP seeks proposal from Interested Bidders who have the necessary experience, capability & expertise to provide SBIL the proposed Services by adhering to SBIL's requirements outlined in this RFP.

2. DISCLAIMER:

- i. The information contained in this RFP or information provided subsequently to Bidder(s) whether verbally or in documentary form/email by or on behalf of SBIL, is subject to the terms and conditions set out in this RFP.
- ii. This RFP is not an offer by SBI Life, but an invitation to receive offer/s from the Interested Bidders who meet the eligibility criteria.
- iii. The purpose of this RFP is to provide the Bidder(s) with information to assist preparation of their Bid 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 contained in this RFP and where necessary obtain independent advices/clarifications. SBIL may in its absolute discretion, but without being under any obligation to do so, update, amend or supplement the information in this RFP.
- iv. SBIL, its employees, advisors and representatives make no representation or warranty and shall have no liability to any person, including any Bidder under any law, statute, rules or

regulations or tort, principles of restitution or unjust enrichment or otherwise for any loss, damages, cost or expense which may arise from or be incurred or suffered on account of anything contained in this RFP or otherwise, including the accuracy, adequacy, correctness, completeness or reliability of the RFP and any assessment, assumption, statement or information contained therein or deemed to form or arising in any way for participation in this bidding process.

- v. SBIL also accepts no liability of any nature whether resulting from negligence or otherwise, howsoever caused arising from reliance of any Bidder upon the statements contained in this RFP.
- vi. The Bidder is expected to examine all instructions, forms, terms and specifications in this RFP. Failure to furnish all information required under this RFP or to submit a Bid not substantially responsive to this RFP in all respect will be at the Bidder's risk and may result in rejection of the Bid.
- vii. The issue of this RFP does not imply that SBIL is bound to select a Bidder or to award the Contract to the successful Bidder, as the case may be, for the Project.
- viii. SBIL reserves the right to amend, modify, vary, add, delete, accept or cancel, in part or full, the present RFP and/or any condition or specification of all proposals/ orders/ responses, with respect to the present RFP, without assigning any reason thereof at any time. Each Bidder shall be entirely responsible for its own costs and expenses that are incurred while participating in the RFP, presentation and other related processes.
- ix. SBIL reserves the right to accept or reject any response/Bids and to annul the entire process of RFP including but not limited to by rejecting all responses/Bids at any time, with the successful Bidder, without thereby incurring any liability to any affected Bidder/s or any obligations to inform the affected Bidder/s of the grounds for SBI Life's decision.
- x. SBIL reserves the right to cancel the entire process at any stage at its sole discretion without assigning any reason thereof.
- xi. By participating in the Bidding Process, the Bidder is hereby expressly consenting to the disclaimers and the other terms and conditions of this RFP in toto.

3. DEFINITIONS:

In this connection, the following terms shall be interpreted as indicated below:

- i. **"SBIL"/"SBI Life"/ "Company"** shall mean SBI Life Insurance Co. Ltd.
- ii. **"Bidder"** shall mean an eligible body corporate entity submitting the Bid in response to this RFP.

- iii. **“Bid”** shall mean and refer to a formal offer/proposal, along with all required documents, duly submitted by the interested bidder(s) in the prescribed format in response to this RFP.
- iv. **“Contract” / “Service Agreement”** means the legally binding definitive agreement executed between SBIL and successful Bidder / Service Provider, the template of which is provided under **Appendix-G**.
- v. **“Service Provider”** shall mean the successful Bidder found eligible as per eligibility criteria set out in this RFP, whose Technical Bid and Commercial Bid have been accepted as per the selection criteria set out in the RFP and to whom notification of award has been given by SBIL.
- vi. **“Deliverables” / “Work Product”** shall mean all work product generated by Consultant solely or jointly with others in the performance of the Services, including, but not limited to, any and all information, notes, reports, material, drawings, records, diagrams, formulae, processes, technology, firmware, software, know-how, designs, ideas, discoveries, inventions, improvements, copyrights, trademarks and trade secrets.
- vii. **“Intellectual Property Rights”** shall mean and include (a) copyrights and all renewals thereof; (b) trademarks, trade names, service marks, service names, logos and corporate names, both primary and secondary, together with all goodwill associated therewith and including, without limitation, all translations, adaptations, combinations and derivations of each of the foregoing, (c) trade secrets and other confidential information (including proposals, financial and accounting data, business and marketing plans, customer and supplier lists and related information); (d) all other intellectual property, including but not limited to design rights, trade names, information technology, domain names; and (e) all registrations and applications for registration, extension or renewal filed anywhere in the world for each of the foregoing.
- viii. **“Total Contract Price” / “Project Cost” / Total Cost of Ownership” (“TCO”)** shall mean the price payable to Service Provider over the entire period of Contract for the full and proper performance of its contractual obligations.
- ix. **“Services”** shall mean all services, scope of work and deliverables to be provided by a successful Bidder Service Provider as described in the RFP and include provision of technical assistance, training, certifications, auditing and other obligation of Service Provider covered under this RFP.

4. SCOPE OF WORK:

The Scope of Work shall be as provided in **Appendix-E** of this RFP.

5. ELIGIBILITY AND TECHNICAL CRITERIA:

- i. Bid is open to all such Bidders who meet the eligibility and technical criteria as given in **Appendix-B & Appendix-C** of this RFP document. The Bidder has to submit the documents substantiating eligibility criteria as mentioned in this RFP document.
- ii. No Bidder or its associate shall submit or cause to submit more than one Bid for the Services desired under this RFP. A Bidder applying individually or as an associate shall not be entitled to submit another Bid either individually or through associates, as the case may be.

6. COST OF BID:

The participating Bidders shall bear all the costs associated with or relating to the preparation and submission of their respective Bids including but not limited to preparation, copying, postage, delivery fees, expenses associated with any demonstration or presentations which may be required by SBIL or any other costs incurred in connection with or relating to their Bid. SBIL shall not be liable in any manner whatsoever for the same or for any other costs or other expenses incurred by a Bidder regardless of the conduct or outcome of the bidding process.

7. CLARIFICATION(S) AND / OR AMENDMENT(S) TO RFP/ PRE- BID MEETING:

- i. Bidder/s requiring any clarification on RFP may notify SBIL in writing strictly as per the Pre-Bid Query format given in **Appendix-I** by e-mail within the date/time mentioned in the Schedule of Events.
- ii. A Pre-Bid meeting will be held at the Venue on the date and time specified in the Schedule of Events which may be attended by the authorized representatives of the respective Bidders. For those who could not attend physically, meeting link for virtual meeting on teams will also be provided (meeting invite and time will be communicated separately).
- iii. The queries received (without identifying source of query) along with response of SBIL thereof will be conveyed to Bidders either published on SBIL's website and/or notified via e-mail.
- iv. SBIL reserves the right to amend, rescind or reissue the RFP. SBIL, for any reason, whether, on its own initiative or in response to a clarification requested by a Bidder, may modify the RFP, by amendment which will be made available to the Bidders by way of corrigendum/addendum to this RFP on SBIL's website. Such amendments/clarifications, if any, issued by SBIL will be binding on the participating Bidders. SBIL, at its own discretion, may extend the deadline for submission of Bids in order to allow interested Bidders a reasonable time to prepare the Bid, for taking the amendment into account. Nothing in this RFP or any addenda/corrigenda or clarifications issued in connection thereto is intended to relieve Bidders from forming their own opinions and conclusions in respect of the matters addresses in this RFP or any addenda/corrigenda or clarifications issued in connection thereto.

- v. No request for change in commercial/legal terms and conditions, other than what has been mentioned in this RFP or any addenda/corrigenda or clarifications issued in connection thereto, will be entertained and queries in this regard, therefore will not be entertained.
- vi. Queries received after the scheduled date and time will not be responded/acted upon.

8. CONTENTS OF BID DOCUMENT:

- i. The Bidder must thoroughly study/analyse and properly understand the contents of this RFP, its meaning and impact of the information contained therein.
- ii. Failure to furnish all information required in this RFP or submission of Bid not responsive to this RFP in any respect will be at the Bidder's risk and responsibility and the same may finally result in rejection of its Bid. SBIL has made considerable effort to ensure that accurate information is contained in this RFP and is supplied solely as guidelines for Bidders.
- iii. The Bid prepared by the Bidder, as well as all correspondences and documents relating to the Bid exchanged by the Bidder and SBIL and supporting documents and printed literature shall be submitted in English.
- iv. The information provided by the Bidders in response to this RFP will become the property of SBIL and will not be returned. Incomplete information in Bid document may lead to non-consideration of the proposal.

9. BID PREPARATION AND SUBMISSION:

The Technical Bid and Commercial Bid are to be submitted separately in **different envelopes** at the address mentioned in the 'Schedule of Events' for providing the Services (as detailed in Scope of Work at **Appendix E** of this RFP).

- i. **Technical Bid:** - The Bidder shall submit the below mentioned documents along with the Technical Bid before the last date of submission and at the address mentioned in Point no. 7 of the Schedule of Events. The Bid document along with such enclosures shall be sealed and sent through envelope which shall clearly bear name of the Project and the Bidder shall mark the envelope as "Technical Bid".

List of Documents:

- (a) Index of all the documents, letters, bid forms etc. submitted in response to RFP along with page numbers.
- (b) Bid covering letter/Bid Form on the lines of **Appendix-A** on Bidder's letter head.
- (c) Specific response with supporting documents in respect of Eligibility Criteria as mentioned in **Appendix-B** and technical eligibility criteria on the lines of **Appendix-C**.
- (d) Bidder's details as per **Appendix-D** on Bidder's letter head.

- (e) A copy of board resolution or equivalent along with copy of power of attorney (POA wherever applicable) or equivalent showing that the signatory has been duly authorized to sign the Bid document.
- (f) Confidentiality cum Non-Disclosure Undertaking as mentioned in **Appendix-H**
- (g) Earnest Money Deposit (EMD) of Rs. 5,00,000/- (Rs Five lakhs only). The EMD should be denominated in Indian Rupees, and should be in the form of a Demand Draft drawn on a Nationalized / Scheduled Bank, favoring SBI Life Insurance Company Ltd.

ii. Commercial Bid: -

The Commercial Bid should be filled using the format given in **Appendix F** and only the cells which are available for data entry should be filled. All other cells in the sheet will be computed.

The Commercial Bid shall contain:-

- a. Prices in respect of all hardware/ equipment and services
- b. Price schedule should also contain the unit prices
- c. Price details of every component i.e. AMC and Manpower in the total solution
- d. All the rates or prices should be quoted in Indian Rupees only

iii. Bidders may please note:

- (a) The Bidder should quote for the entire package on a single responsibility basis for Services it proposes to provide.
- (b) While submitting the Technical Bid, literature on the Services should be segregated and kept together in one section.
- (c) Care should be taken that the Technical Bid shall not contain any price information. Such proposal, if received, will be rejected.
- (d) The Bid document shall be complete in accordance with various clauses of the RFP document or any addenda/corrigenda or clarifications issued in connection thereto, duly signed by the authorized representative of the Bidder. Board resolution authorizing representative to Bid and make commitments on behalf of the Bidder is to be attached.
- (e) Bids are liable to be rejected if only one among the two Bid parts (i.e. Technical Bid or Commercial Bid) is received.
- (f) If deemed necessary, SBIL may seek clarifications on any aspect from the Bidder. However, that would not entitle the Bidder to change or cause any change in the substances of the Bid already submitted or the price quoted.
- (g) The Bidder may also be asked to give presentation for the purpose of clarification of the Bid.
- (h) The Bidder must provide specific and factual replies to the points raised in the RFP.
- (i) The Bid shall be typed or written and shall be digitally signed by the Bidder or a person or persons duly authorized to bind the Bidder to the Contract.
- (j) All the enclosures (Bid submission) shall be serially numbered.

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- (k) Bidder(s) should prepare and submit their Bids well in advance before the prescribed date and time to avoid any delay or problem during the Bid submission process. SBIL shall not be responsible for any sort of delay or the difficulties faced by the Bidder(s) during the submission of Bids.
- (l) SBIL at its sole discretion reserves the right to reject Bids not conforming to above.

10. DEADLINE FOR SUBMISSION OF BIDS:

- i. Bids along with the documents mentioned in Clause 9 of the present RFP must be submitted on the address provided within the timeline as prescribed in the "Schedule of Events", failing which Bid will be treated as non-responsive.
- ii. In the event of the specified date for submission of Bids being declared a holiday for SBIL, the Bids will be received upto the appointed time on the next working day.
- iii. In case SBIL extends the scheduled date of submission of Bid document, the Bids shall be submitted by the time and date rescheduled. All rights and obligations of SBIL and Bidders will remain the same.
- iv. The bidder should furnish, as part of its Bid, EMD of Rs. 5,00,000/- (Rs Five lakhs only) at the time of bid submission. The EMD should be denominated in Indian Rupees, and should be in the form of a Demand Draft issued by a Nationalized / Scheduled Bank, in favour of SBI Life Insurance Company Ltd.
- v. EMD will be returned back to unsuccessful Bidder within 3 weeks post selection of successful bidder. For successful bidder EMD will be returned on submission of Performance Bank Guarantee.
- vi. Bidders are not permitted to submit more than one bid.
- vii. Bids may be sent by registered post or hand delivered so as to be received at the following

Address:

AVP IT Support
SBI Life Insurance Co Ltd,
1st floor, Kapas Bhavan, CBD Belapur
Navi Mumbai.
Pin: 400614

Receipt of the bids shall be closed at 6:00 p.m. on the date mentioned above. Bids received after the time stipulated will not be considered by SBIL. SBIL will not be responsible for any delay due to postal / courier or any other means of delivery. Bids submitted in consortium are strictly prohibited.

11. MODIFICATION AND WITHDRAWAL OF BIDS:

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- i. The Bidder may modify or withdraw its Bid after the Bid submission, provided modification, including substitution or withdrawal of the Bids, is received at the address for submission of Bid prior to the deadline prescribed for submission of Bids.
- ii. No modification in the Bid shall be allowed, after the deadline for submission of Bids.
- iii. No Bid shall be withdrawn in the interval between the deadline for submission of Bids and the expiration of the period of Bid validity specified in this RFP.

12. PERIOD OF BID VALIDITY:

- i. Bid shall remain valid for duration of 6 calendar months from Bid submission date.
- ii. In exceptional circumstances, SBIL may solicit the Bidders' consent to an extension of the period of validity. The request and the responses thereto shall be made in writing. A Bidder is free to refuse the request. However, any extension of validity of Bids or price will not entitle the Bidder to revise/modify the Bid document.
- iii. Once notification of award or Letter of Intent is issued by SBIL, the said price will remain fixed for the entire Contract period and shall not be subjected to variation on any account, including exchange rate fluctuations, if applicable. A Bid submitted with an adjustable price quotation will be treated as non-responsive and will be rejected.

13. BID INTEGRITY:

Willful misrepresentation of any fact within the Bid will lead to the cancellation of the Contract without prejudice to other actions that SBIL may take. All the submissions, including any accompanying documents, will become property of SBIL. The Bidders shall be deemed to license, and grant all rights to SBIL, to reproduce the whole or any portion of their Bid document for the purpose of evaluation and to disclose the contents of submission for regulatory and legal requirements.

14. BIDDING PROCESS/OPENING OF TECHNICAL BIDS:

- i. All the technical Bids received up to the specified time and date will be opened for initial evaluation.
- ii. In the first stage, only technical Bid will be opened and evaluated. Bids of such Bidders satisfying eligibility criteria and agree to comply with all the terms and conditions specified in the RFP will be evaluated for technical criteria/specifications/eligibility. Only those Bids complied with technical criteria shall become eligible for Commercial Bid opening and further RFP evaluation process.
- iii. SBIL will examine the Bids to determine whether they are complete, the required formats

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have been furnished, the documents have been properly signed and the Bids are in specified order. SBIL may, at its discretion waive any minor non-conformity or irregularity in a Bid which does not constitute a material deviation.

- iv. Prior to the detailed evaluation, SBIL will determine the responsiveness of each Bid to the RFP. For purposes of these Clauses, a responsive Bid is one, which conforms to all the terms and conditions of the RFP in toto, without any deviation.
- v. SBIL's determination of a Bid's responsiveness will be based on the contents of the Bid itself, without recourse to extrinsic evidence.
- vi. After opening of the technical Bids and preliminary evaluation, some or all the Bidders may be asked to make presentations on the Service proposed to be offered by them.
- vii. If a Bid is not responsive, it will be rejected by SBIL and the same cannot subsequently be made responsive by the Bidder by correction of the non-conformity.

15. EVALUATION OF TECHNICAL BID:

- i. The evaluation of Technical Bid will include assessment of the technical information submitted as per technical Bid format, demonstration of proposed Services, reference calls and site visits, wherever required. The Bidder may highlight the noteworthy/superior features of their Services. The Bidder will demonstrate/substantiate all claims made in the technical Bid along with supporting documents to SBIL.
- ii. During evaluation and comparison of Bids, SBIL may, at its discretion ask the Bidders for clarification on the Bids received. The request for clarification shall be in writing and no change in prices or substance of the Bid shall be sought, offered or permitted. No clarification at the initiative of the Bidder shall be entertained after Bid submission date.

Among other things, the following aspects may be considered for evaluating the technical bids:

- 1. Company profile
- 2. Management capabilities of the Bidder
- 3. Bidder support facilities
- 4. Past experience of the Bidder in similar lines of business,
- 5. Past experience of the SBIL with the Bidder
- 6. Reputation of the Bidder
- 7. Feedback from existing customers of the Bidders (Reference checking)
- 8. Distance of nearest support center from SBIL Offices
- 9. Delivery & Implementation schedule.
- 10. Compliance with technical specifications laid down in this RFP
- 11. Acceptance of terms and conditions laid down in this RFP
- 12. Presentation from bidder

16. EVALUATION OF COMMERCIAL BIDS AND FINALIZATION:

- i. The Commercial Bid(s) of only those Bidders, who are short-listed after technical evaluation, would be opened.
- ii. The price evaluation as quoted in the Commercial Bid will be one of the prime criteria to identify the successful Bidder.
- iii. Errors, if any, in the price breakup format will be rectified as under:
 - (a) If there is a discrepancy between the unit price and total price which is obtained by multiplying the unit price with quantity, the unit price shall prevail and the total price shall be corrected unless it is a lower figure. If the Bidder does not accept the correction of errors, the Bid will be rejected.
 - (b) If there is a discrepancy in the unit price quoted in figures and words, the unit price in figures or in words, as the case may be, which corresponds to the total Bid price for the Bid shall be taken as correct.
 - (c) If the Bidder has not worked out the total Bid price or the total Bid price does not correspond to the unit price quoted either in words or figures, the unit price quoted in words shall be taken as correct.
 - (d) The Bidder should quote for all the items/services desired in this RFP. In case, prices are not quoted by any Bidder for any specific product and / or service, for the purpose of evaluation, the highest of the prices quoted by other Bidders participating in the bidding process will be reckoned as the notional price for that service, for that Bidder. However, if selected, at the time of award of Contract, the lowest of the price(s) quoted by other Bidders (whose Price Bids are also opened) for that service will be reckoned. This shall be binding on all the Bidders. However, SBIL reserves the right to reject all such incomplete Bids.

17. CONTACTING SBI LIFE:

- i. No Bidder shall contact SBIL on any matter relating to its Bid, from the time of opening of Commercial Bid to the time, the Contract is awarded.
- ii. Any effort by a Bidder to influence SBIL in its decisions on Bid evaluation, bid comparison or Contract award may result in the rejection of the Bid.

18. AWARD CRITERIA AND AWARD OF CONTRACT:

- i. Total cost of Services along with cost of all items specified in **Appendix F** should be quoted by the Bidder(s) in Commercial Bid.
- ii. SBIL will notify successful Bidder in writing by way of issuance of notification of award through letter or email that its Bid has been accepted. The successful Bidder has to return the duplicate copy of the same to SBIL within **7 working days**, duly Accepted, Stamped

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and Signed by Authorized Signatory as a token of acceptance.

- iii. The successful Bidder will have to submit the performance BG for the amount and validity as specified in this RFP, which shall be in line with/similar to the format provided in **Appendix-K** of this RFP within 15 days of notification of award.
- iv. Copy of board resolution or equivalent and power of attorney (POA wherever applicable) or equivalent evidencing that the signatory has been duly authorized to sign the acceptance letter and Contract should be submitted.
- v. The successful Bidder shall be required to enter into a Contract with SBIL within 30 days from the date of notification of award or within such extended period as may be decided by SBIL.
- vi. Till execution of a formal Contract, the RFP, along with SBIL's notification of award and Service Provider's acceptance thereof, would be binding contractual obligation between SBIL and the successful Bidder.
- vii. SBIL reserves the right to stipulate, at the time of finalization of the Contract, any other document(s) to be enclosed as a part of the final Contract.
- viii. Failure of the successful Bidder to comply with the requirements/terms and conditions of this RFP shall constitute sufficient grounds for the annulment of the award.

19. POWERS TO VARY OR OMIT WORK:

- i. No alterations, amendments, omissions, additions, suspensions or variations in the Scope of Work (hereinafter referred to as 'variation') under the Contract shall be made by the successful Bidder except as directed in writing by SBIL. SBIL shall have full powers, to instruct the successful Bidder to make any variation without prejudice to the Contract. The finally selected Bidder shall carry out such variation and be bound by the same conditions as far as applicable as though the said variations occurred in the Contract. If any, suggested variations would, in the opinion of the finally selected Bidder, if carried out, prevent him from fulfilling any of his obligations under the Contract, he shall notify SBIL thereof in writing with reasons for holding such opinion and SBIL may instruct the finally selected Bidder to make such other modified variation without prejudice to the Contract. The finally selected Bidder shall carry out such variation and be bound by the same conditions as far as applicable as though the said variations occurred in the Contract.
- ii. If the successful Bidder has received instructions from SBIL as to the requirements for carrying out the altered or additional substituted work which either then or later on, will in the opinion of the finally successful Bidders, involve a claim for additional payments, such additional payments shall be mutually agreed.
- iii. If any change in the scope of the work is likely to result in reduction in cost, the parties

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shall agree in writing so as to the extent of change in contract price, before the finally selected Bidder proceeds with the change.

20. WAIVER OF RIGHTS:

Each Party agrees that any delay or omission on the part of the other Party to exercise any right, power or remedy under this RFP will not automatically operate as a waiver of such right, power or remedy or any other right, power or remedy and no waiver will be effective unless it is in writing from the waiving Party. Further the waiver or the single or partial exercise of any right, power or remedy by either Party hereunder on one occasion will not be construed as a bar to a waiver of any successive or other right, power or remedy on any other occasion.

21. BANK GUARANTEE:

As security towards the performance of the Services mentioned under the RFP/Contract, a performance Bank Guarantee ("BG") favouring SBI Life Insurance Company Ltd. drawn on a Nationalised/Scheduled Commercial Bank in line with/similar to the format provided under **Appendix-K** for an amount equivalent to 10% of the Total Project Cost with validity period of 5 Years shall be submitted by the selected/successful Bidder(s). The performance BG needs to be submitted within 15 days from the date of notification of the award by SBIL.

- i. The performance BG is to protect the interest of SBIL against the risk of Service Provider's failure in implementation of the Services/project and/or fulfilling its commitments / obligations in respect of providing Services as mentioned in this RFP or breach of any terms and conditions of the RFP.

22. RIGHT TO VERIFICATION:

SBIL reserves the right to verify any or all of the statements made by the Bidder in the Bid document and to inspect the Bidder's facility, if necessary, to establish to its satisfaction about the Bidder's capacity/capabilities to perform the job.

23. SUBCONTRACTING:

As per scope of the present RFP, subcontracting can be done, but core & critical function (Project Manager, Team Lead & Resident Engineer support as stated in the Scope of Work) must be through resources who are on pay roll of Bidder.

24. VALIDITY OF CONTRACT:

The Contract will be valid for the period of Five (05) year, commencing from 1st April, 2025 to 31st March, 2030

25. CONFIDENTIALITY:

Confidentiality obligation shall be as per Confidentiality cum Non-Disclosure Undertaking as provided in **Appendix-H** to this RFP and also the clause 08 of Service Agreement template placed as **Appendix -G** to this RFP.

26. INTELLECTUAL PROPERTY RIGHTS AND OWNERSHIP:

- i. Service Provider agrees that all data or information supplied by SBIL to Service Provider in connection with the provision of Services by it shall remain the property of SBIL or its licensors.
- ii. On any licensed material used by Service Provider for performing Services or developing Work Product for SBIL, Service Provider should have a valid and subsisting right to use as well as to further license for the Services performed/provided. SBIL shall not be liable for any license or IPR violation/infringement on the part of Service Provider.
- iii. The Service Provider shall, at all times and at its own expenses without any limitation, indemnify and keep fully and effectively indemnified SBIL against all costs, claims, damages, demands, expenses and liabilities of whatsoever nature arising out of or in connection with all claims of infringement of Intellectual Property Rights, including patent, trademark, copyright, trade secret or industrial design rights of any third party arising from the Services or use of Work Product or any part thereof in India or abroad under this RFP.
- iv. All Work Product prepared by the Service Provider in performing the Services shall become and remain the sole and exclusive property of SBIL and all Intellectual Property Rights in such Work Product shall vest with SBIL. Any Work Product, of which the ownership or the Intellectual Property Rights do not vest with SBIL under law, shall automatically stand assigned to SBIL as and when such Work Product is created and Service Provider agrees to execute all papers and to perform such other acts as SBIL may deem necessary to secure its rights herein assigned by Service Provider. The Work Product shall not be used for any purpose other than intended under the scope of work, without prior written consent of SBIL.
- v. In the event that Service Provider integrates any work that was previously created by Service Provider into any Work Product, Service Provider shall grant to, and SBIL is hereby granted, a worldwide, royalty-free, perpetual, irrevocable license to utilize the incorporated items, including, but not limited to, any and all copyrights, patents, designs, trade secrets, trademarks or other Intellectual Property Rights, in connection with the Work Product.

27. LIQUIDATED DAMAGES:

If Service Provider fails to deliver and perform any or all the Services within the stipulated time, schedule as specified in this RFP and/or Contract, SBIL may, without prejudice to its other remedies under the RFP and/or Contract, and unless otherwise extension of time is agreed upon without the application of liquidated damages, deduct from the Project Cost, as liquidated damages a sum equivalent to 0.5% of total Project Cost for delay of each week or part thereof maximum up to 5% of total Project Cost. Once the maximum deduction is reached, SBIL may consider termination of the Contract.

28. CONFLICT OF INTEREST:

- i. Bidder shall not have a conflict of interest that affects the bidding process. Any Bidder found to have a conflict of interest shall be disqualified and SBIL may including and not limited to other remedies available, forfeit the EMD of such Bidder. In the event of disqualification of a successful Bidder, SBIL shall be entitled to appropriate the Performance Security (i.e. BG) towards the loss and damage suffered/likely to be suffered and incurred by SBIL (the "Damages"), and the same would be without prejudice to any other right or remedy that may be available to SBIL under the bidding Documents and/ or the Contract or otherwise.
- ii. It is further clarified that:
 - (a) Bidder shall not receive any remuneration in connection with the assignment except as provided in the Contract.
 - (b) Bidder shall provide professional, objective and impartial advice and at all times hold SBIL's interest's paramount, strictly avoiding conflicts with other assignment(s)/job(s) or their own corporate interests, and act without any expectation/ consideration for award of any future assignment(s) from SBIL. Bidder shall avoid any conflict of interest while discharging contractual obligations and bring, before-hand, any possible instance of conflict of interest to the knowledge of SBIL, while rendering Services under the Contract.

29. CODE OF INTEGRITY AND DEBARMENT/BANNING:

- i. The Bidder and their respective officers, employees, agents and advisers shall observe the highest standard of ethics during the bidding process. Notwithstanding anything to the contrary contained herein, SBIL shall reject Bid without being liable in any manner whatsoever to the Bidder if it determines that the Bidder has, directly or indirectly or through an agent, engaged in corrupt / fraudulent / coercive / undesirable or restrictive practices in the bidding process or otherwise.
- ii. Bidders are obliged under code of integrity to suo-moto proactively declare any conflicts of interest (pre-existing or as and as soon as these arise at any stage) in RFP process or execution of Contract. Failure to do so would amount to violation of this code of integrity.

iii. Any Bidder needs to declare any previous transgressions of such a code of integrity with any entity in any country during the last three years or of being debarred by any other procuring entity. Failure to do so would amount to violation of this code of integrity.

iv. For the purposes of this clause, the following terms shall have the meaning hereinafter, respectively assigned to them:

- (a) **“corrupt practice”** means making offers, solicitation or acceptance of bribe, rewards or gifts or any material benefit, in exchange for an unfair advantage in the procurement process or to otherwise influence the procurement process or Contract execution;
- (b) **“Fraudulent practice”** means any omission or misrepresentation that may mislead or attempt to mislead so that financial or other benefits may be obtained or an obligation avoided. This includes making false declaration or providing false information for participation in a RFP process or to secure a Contract or in execution of the Contract;
- (c) **“Coercive practice”** means harming or threatening to harm, persons or their property to influence their participation in the procurement process or affect the execution of a contract;
- (d) **“Anti-competitive practice”** means any collusion, bid rigging or anti-competitive arrangement, or any other practice coming under the purview of the Competition Act, 2002, as amended from time to time, between two or more Bidders, with or without the knowledge of SBIL, that may impair the transparency, fairness and the progress of the procurement process or to establish Bid prices at artificial, non-competitive levels;
- (e) **“Obstructive practice”** means materially impede SBIL's or any Government or regulatory agencies, investigation into allegations of one or more of the above mentioned prohibited practices either by deliberately destroying, falsifying, altering; or by concealing of evidence material to the investigation; or by making false statements to investigators and/or by threatening, harassing or intimidating any party to prevent it from disclosing its knowledge of matters relevant to the investigation or from pursuing the investigation; or by impeding SBIL's rights of audit or access to information;

v. Debarment/Banning

Empanelment/participation of Bidders and their eligibility to participate in SBIL's procurements is subject to compliance with code of integrity and performance in contracts as per terms and conditions of contracts. Following grades of debarment from empanelment/participation in SBIL's procurement process shall be considered against delinquent Vendors/Bidders:

(a) Holiday Listing (Temporary Debarment - suspension):

Whenever a Bidder is found lacking in performance, in case of less frequent and less serious misdemeanors, the Bidder may be put on a holiday listing (temporary debarment) for a period upto 12 (twelve) months. When a Bidder is on the holiday listing, he is neither invited to Bid nor are his Bids considered for evaluation during the period of the holiday. The Bidder is, however, not removed from the list of empaneled vendors, if any. Performance issues which may justify holiday listing of the Bidder among other things are:

- Repeated non-performers or performers below specified standards (including after sales services and maintenance services etc.);

(b) Debarment from participation including removal from empanelled list

Debarment of a delinquent Bidder (including their related entities) for a period (one to two years) from SBIL's procurements including removal from empanelment, wherever such Bidder is empaneled, due to severe deficiencies in performance or other serious transgressions. Reasons which may justify debarment and/or removal of the Bidder from the list of empaneled vendors are:

- Without prejudice to the rights of SBIL hereinabove, if a Bidder is found by SBIL to have directly or indirectly or through an agent, engaged or indulged in any corrupt/fraudulent/coercive/undesirable or restrictive practices during the bidding process, such Bidder shall not be eligible to participate in the RFP process.
- Bidder fails to abide by the terms and conditions or to maintain the required technical/operational staff/equipment or there is change in its production/service line affecting its performance adversely, or fails to cooperate or qualify in the review.
- If Bidder ceases to exist or ceases to operate in the category of requirements for which it is empaneled;
- Bankruptcy or insolvency on the part of the Bidder as declared by a court of law; or
- Banning by Ministry/Department or any other Government agency;
- Other than in situations of force majeure, technically qualified Bidder withdraws from the procurement process or after being declared as successful Bidder: (i) withdraws from the process; (ii) fails to enter into a Contract; or (iii) fails to provide performance guarantee or any other document or security required in terms of the RFP documents;
- Any other ground, based on which SBIL considers, that continuation of Contract is not in public interest.
- If there is strong justification for believing that the partners/directors/proprietor/agents of the Bidder has been guilty of violation of integrity, evasion or habitual default in payment of any tax levied by law; etc.

30. FORCE MAJEURE:

- i. Notwithstanding the provisions of terms and conditions contained in this RFP, neither party shall be liable for any delay in performing its obligations herein if and to the extent that such delay is the result of an event of Force Majeure.
- ii. For the purposes of this clause, 'Force Majeure' means and includes wars, insurrections, revolution, civil disturbance, riots, terrorist acts, public strikes, hartal, bundh, fires, floods, pandemic, epidemic, quarantine restrictions, freight embargoes, declared general strikes in relevant industries, Vis Major, acts of Government in their sovereign capacity, impeding reasonable performance of Bidder/selected Bidder but does not include any foreseeable events, commercial considerations or those involving fault or negligence on the part of the party claiming Force Majeure.
- iii. If a Force Majeure situation arises, Bidder shall promptly notify SBIL in writing of such condition and the cause thereof. Unless otherwise directed by SBIL in writing, Bidder shall continue to perform its obligations under this RFP as far as is reasonably practical, and shall seek all reasonable alternative means for performance not prevented by the Force Majeure event.
- iv. If the Force Majeure situation continues beyond 30 (thirty) days, the Bidder shall have the right to terminate the participation under RFP by giving a notice to SBIL. Neither party shall have any penal liability to the other in respect of the termination of the participation under the RFP as a result of an event of Force Majeure.

31. TERMINATION FOR INSOLVENCY:

SBIL may, at any time, terminate the Participation of the Bidder in the RFP, if the Bidder becomes Bankrupt or insolvent or any application for bankruptcy, insolvency or winding up has been filed against it by any person.

32. TAXES AND DUTIES:

- i. Service Provider shall be liable to pay all corporate taxes and income tax that shall be levied according to the laws and regulations applicable from time to time in India and the price Bid by Service Provider shall include all such taxes in the quoted price.
- ii. Prices quoted should be exclusive of all Central / State Government taxes/duties and levies but inclusive of all corporate taxes.
- iii. Tax, if any, shall be paid as per the actual on production of relevant documents, in original
- iv. Prices payable to Service Provider as stated in the Contract shall be firm and not subject to adjustment during performance of the Contract, irrespective of reasons whatsoever, including exchange rate fluctuations.
- v. Income / Corporate Taxes in India: The Bidder shall be liable to pay all corporate taxes and

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income tax that shall be levied according to the laws and regulations applicable from time to time in India and the price Bid by the Bidder shall include all such taxes in the contract price.

- vi. All expenses, stamp duty and other charges/ expenses in connection with the execution of the Contract as a result of this RFP process shall be borne by Service Provider. The Service Agreement/ Contract would be stamped as per Maharashtra Stamp Act, 1958 and any amendment thereto.

33. TAX DEDUCTION AT SOURCE:

Wherever the laws and regulations require deduction of such taxes at the source of payment, SBIL shall affect such deductions from the payments if any due to the Bidder. The remittance of amounts so deducted and issuance of certificate for such deductions shall be made by SBIL as per the laws and regulations for the time being in force.

34. SEVERABILITY

If any part or provision of this RFP is found to be invalid or unenforceable by any court or administrative body of competent jurisdiction, the invalidity or unenforceability of such provision or part shall not affect the other parts or provisions of this RFP and the same shall remain unimpaired and in full force and effect.

Part-II

Appendix –A

BID FORM (TECHNICAL BID)

[On Bidder's letter head]

(To be included in Technical Bid)

Date: _____

To:

SBI LIFE INSURANCE COMPANY LTD,

Central Processing Centre,

8th Level Seawoods Grand Central,

Tower 2, Plot No R-1, Sector 40,

Seawoods, Nerul Node,

Navi Mumbai- 400706,

Dear Sir,

RFP No: SBIL/2024-25/DIG/008 Dated DD/MM/YYYY

~~~~~

We < *name of the body corporate/entity* > (herein after referred to as the 'Bidder') have examined the above referred RFP namely **SBIL/2024-25/DIG/008 Dated DD/MM/YYYY**, the receipt of which is hereby duly acknowledged and subsequent to pre-bid clarifications/ modifications / revisions, if any, furnished by SBIL, offer to provide Services detailed in this RFP. We shall abide by the terms and conditions spelt out in the RFP. We shall participate and submit the Technical Bid and Commercial Bid along with the prescribed enclosures in two separate envelopes on or before the submission date as specified in the Schedule of Events of the RFP.

i. 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 any conflict of interest obligation mentioned in the RFP.
- commercials in the Commercial Bid submitted by us have been arrived at without agreement with any other Bidder of the RFP for the purpose of restricting competition.
- The commercials in the Commercial Bid submitted by us have not been disclosed and will not be disclosed to any other Bidder responding to the 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 services/items mentioned in the RFP in our Commercial Bid.

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- The rate quoted in the Commercial Bids are as per the RFP and subsequent pre-Bid clarifications/ modifications/ revisions furnished by SBIL, without any exception.
- ii. We undertake that, in competing for (and, if the award is made to us, in executing) the above Contract, we will strictly observe the laws against fraud and corruption in force in India namely "Prevention of Corruption Act 1988".
- iii. We undertake that we will not offer, directly or through intermediaries, any bribe, gift, consideration, reward, favor, any material or immaterial benefit or other advantage, commission, fees, brokerage or inducement to any official of SBIL, 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.
- iv. We undertake that we will not resort to canvassing with any official of SBIL, connected directly or indirectly with the bidding process to derive any undue advantage. We also understand that any violation in this regard, will result in our disqualification from further bidding process.
- v. 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, SBIL will have right to disqualify us from the RFP without prejudice to any other rights available to SBIL.
- vi. 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 SBIL.
- vii. We agree to abide by all the RFP terms and conditions, contents of the Contract / Service Agreement as per template available at **Appendix-G** of the RFP under reference.
- viii. Till execution of a formal Contract, the RFP, along with SBIL's notification of award by and our acceptance thereof, would be binding contractual obligation on us.
- ix. We understand and agree 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.
- x. We hereby certify that our name does not appear in any "Caution" list of IRDAI / or any other regulatory body for outsourcing activity.
- xi. We hereby certify that on the date of submission of Bid for the RFP, we do not have any past/ present litigation which adversely affect our participation in the RFP and or which materially impacts our going concern or we are not blacklisted/penalized/punished for breach of contract/fraud/corrupt practices by any commercial establishments / public or private insurance companies / Public Sector Undertaking/ State or Central Government or their agencies/departments.

- xii. We hereby certify that on the date of submission of Bid, we do not have any service agreement pending to be signed with SBIL for more than 6 months.
- xiii. If our Bid is accepted, we undertake to enter into and execute at our cost, when called upon by SBIL to do so, a Contract in the prescribed form and also submit performance BG as security for our performance of Contract and we shall be solely responsible for the due performance of the Contract.
- xiv. We understand and agree that upon any violation or breach of any of the terms and condition of the RFP and/or the Contract, SBIL may at its sole discretion forfeit our EMD or invoke the performance BG submitted by us, as the case may be.
- xv. We, further, hereby undertake and agree to abide by all the terms and conditions stipulated by SBIL in the RFP.

Dated this ..... day of ..... 2025

**For** \_\_\_\_\_

\_\_\_\_\_

**Name:** \_\_\_\_\_

**Designation:** \_\_\_\_\_

Duly authorized to sign Bid for and on behalf of \_\_\_\_\_

**Seal of the Bidder.**

## **Appendix-B**

### **Bidder's Eligibility Criteria**

Bidders meeting the following criteria are eligible to submit their Bids along with supporting documents. If the Bid is not accompanied by all the required documents supporting eligibility criteria, the same would be rejected:

| <b>S. No.</b> | <b>Eligibility Criteria</b>                                                                                                                                                                                                                                                                                             | <b>Compliance (Yes/No)</b> | <b>Documents to be submitted</b>                                                                                                                                                                                                                             |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.            | The Bidder must be an Indian Company/ LLP /Registered Partnership firm registered under applicable Act in India.                                                                                                                                                                                                        |                            | Certificate of Incorporation issued by Registrar of Companies or equivalent and full address of the registered office/ principle place of business along with Memorandum & Articles of Association/ Registered Partnership Deed/ LLP Agreement or equivalent |
| 2.            | The Bidder should be profitable organization on the basis of profit before tax (PBT) for at least 02 (two) out of last 03 (three) financial years. Average Annual turnover of Rs. 250 Crores in last 3 financial years                                                                                                  |                            | Copy of the audited financial statement along with profit and loss statement for corresponding years and / or Certificate of the statutory auditor.<br>Segment of Balance sheet clearly marking the segment for last three years                             |
| 3.            | Bidder should have experience of minimum 5 years in providing the Services in field of FMS support and AMC services                                                                                                                                                                                                     |                            | Copy of the purchase order and / or Certificate of completion of the work.                                                                                                                                                                                   |
| 4.            | Client references and contact details (email/ landline/ mobile) of customers for whom the Bidder has executed similar projects in India in at least 2 should be from BFSI sector<br>(Start and End Date of the Project to be mentioned) in the past 3 years without any gap (At least 3 client references are required) |                            | Bidder should specifically confirm on their letter head in this regard as per <b>Appendix-J</b>                                                                                                                                                              |
| 5.            | Past/present litigations, disputes, if any (Adverse litigations could result in disqualification, at the sole discretion of SBIL)                                                                                                                                                                                       |                            | Brief details of litigations, disputes related to product/services being procured under this RFP or infringement of any third party Intellectual Property Rights by prospective Bidder/ OEM or                                                               |

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|     |                                                                                                                                                                                                        |  |                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|     |                                                                                                                                                                                                        |  | disputes among Bidder's board of directors, liquidation, bankruptcy, insolvency cases or cases for blacklisting/penalizing/punishing for breach of contract/fraud/corrupt practices by any commercial establishments / public or private insurance companies / Public Sector Undertaking / State or Central Government or their agencies/ departments or any such similar cases<br>Self-declaration on company letterhead with sign & stamp. |
| 6.  | The Bidder should have adequate certified trained personnel comprising support staff to enable the Bidder to execute the work as per requirement, on a continuous basis during the tenure of the work. |  | Provide details in separate sheet                                                                                                                                                                                                                                                                                                                                                                                                            |
| 7.  | The Bidder should provide support for devices of all reputed OEMs.                                                                                                                                     |  | Mention OEM Names for support on PC, Laptop, printer and Scanner<br>Self-declaration on company letterhead with sign & stamp.                                                                                                                                                                                                                                                                                                                |
| 8.  | Undertaking that the support including spares for the quoted products shall be available for next 5 years.                                                                                             |  | Enclose undertaking                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 9.  | No. of locations where Service Provider can provide services - provide mapping in Annexure D.1 Branch Address Details for Support of <b>Appendix E</b> of the RFP.                                     |  | Map in Annexure - D.1                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 10. | Bidder should be fully complied with statutory employee norms for minimum wages, PF and ESI. SBI Life will have the rights to verify supporting documents from the selected Bidder                     |  | Self-declaration on company letterhead with sign & stamp                                                                                                                                                                                                                                                                                                                                                                                     |
| 11. | The Bidder Should possess at least one of the following valid certifications<br>1. ISO 9001-QMS<br>2. ISO 20000- ITMS<br>3. ISO 27001:2013 or Latest                                                   |  | Copy of relevant Certificate/Document.                                                                                                                                                                                                                                                                                                                                                                                                       |
| 12. | Bidder will provide the self-declaration regarding GST that I/We are regular filer of                                                                                                                  |  | Self-declaration on company letterhead with sign & stamp                                                                                                                                                                                                                                                                                                                                                                                     |

|  |                                                                                          |  |  |
|--|------------------------------------------------------------------------------------------|--|--|
|  | GST returns. Please find attached the recent<br>GST filing details in separate document. |  |  |
|--|------------------------------------------------------------------------------------------|--|--|

Documentary evidence must be furnished against each of the above criteria along with an index. All documents must be signed by the authorized signatory of the Bidder. Relevant portions, in the documents submitted in pursuance of eligibility criteria, should be highlighted.

**Name & Signature of authorized signatory**

**Seal of Bidder**

## **Appendix-C**

### **Technical Eligibility Criteria**

The Bids shall be evaluated on the below mentioned technical parameters, technical Bid should contain the details on these parameters

| <b>Sr.#</b> | <b>Parameter</b>                                                                                               |
|-------------|----------------------------------------------------------------------------------------------------------------|
| 1           | Past Experience in similar Support Services in BFSI                                                            |
| 2           | Strong presence in Remote Infrastructure Management (RIM) & Located in Mumbai / nearby Location with BCP       |
| 3           | Understanding of the requirement / Scope of Work                                                               |
| 4           | Support Methodology – Quality check, Training to support staff on Technical & Soft Skills, Certifications etc. |
| 5           | Manpower Mapping & deployment capability at SBIL Regional office                                               |
| 6           | Asset management Capability                                                                                    |
| 7           | Transition Plan                                                                                                |
| 8           | Presentation                                                                                                   |
| 9           | Customer reference check (Min. 2)                                                                              |

**Appendix-D**

**Bidder Details Format**

**Details of the Bidder**

| S. No. | Particulars                                                                                                                                                                                                                                                                | Details |
|--------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| 1.     | Name                                                                                                                                                                                                                                                                       |         |
| 2.     | Date of Incorporation and / or commencement of business                                                                                                                                                                                                                    |         |
| 3.     | Certificate of incorporation or equivalent                                                                                                                                                                                                                                 |         |
| 4.     | Brief description of the Bidder including details of its main line of business                                                                                                                                                                                             |         |
| 5.     | Bidder website URL                                                                                                                                                                                                                                                         |         |
| 6.     | Bidder Pan Number                                                                                                                                                                                                                                                          |         |
| 7.     | Bidder GSTIN Number                                                                                                                                                                                                                                                        |         |
| 8.     | Particulars of the Authorized Signatory of the Bidder <ul style="list-style-type: none"> <li>a) Name</li> <li>b) Designation</li> <li>c) Address</li> <li>d) Phone Number (Landline)</li> <li>e) Mobile Number</li> <li>f) Fax Number</li> <li>g) Email Address</li> </ul> |         |

**Name & Signature of authorized signatory**

**Seal of Bidder**



## **Appendix-E**

### **Scope of Work, Payment Schedule and Penalties**

Enablement of SBI Life in setting up a full-fledged IT Service Management functions, adhering to ITIL framework.

Selected Bidder's support team will be seating at SBIL's Belapur office for handholding & understanding the setup till MPLS infrastructure gets ready at Bidder's location. Temporary 10 seats will be made available to selected Bidder at SBIL's Belapur office

#### **Service Delivery Model:**

1. Core delivery team/Remote support engineer should be Offsite at selected vendor location. SBI Life will provide Service desk agent license, Call Logging software and Agent telephony system licenses for functioning of Service desk operations from Vendor's site.
2. Vendor's Remote Infrastructure Management (RIM) center preferably located in Navi Mumbai or in Mumbai or in Thane. With availability of parallel or alternate BCP Site.
3. All resident engineers for Regional Offices, Processing Centers will be onsite at respective Regional Offices, Processing Center officers. However, Team Leaders and project managers will be placed at SBI Life's Belapur Office
4. SBI Life would only provision seating arrangement for max 12 people at Belapur office.
5. Any additional resource required to deliver the project should seat out of Vendor premises at no extra cost to SBI Life.
6. SBIL would like to discover the consumables rates as per **Annexure F** and may negotiate if required. Same will be rediscovered yearly till end of contract.

SBIL is looking for Comprehensive Annual Maintenance Contract (AMC) for all the equipment's as per **Annexure-A** and engagement of Resources for Remote support, On-site resident engineer support & on call support. It will be the responsibility of the selected Bidder to ensure availability of a pool of spares to service the assets within the resolution time spelt out elsewhere in this RFP. The AMC should cover the cost of replacement and the related labor charges. The detailed Scope of Work is enclosed in annexures which is exhaustive but not comprehensive as under:

- Annexure B.1. SoW\_Remote Support Engineer
- Annexure B.2. SoW\_Centralized IT Service Desk
- Annexure B.3. SoW\_Vendor Management
- Annexure B.4. SoW\_Onsite support at Processing Center, Regional Offices
- Annexure B.5. SoW\_Audit & IT Security Compliance Management and Mandatory Information Security Requirements.
- Annexure B.6. SoW\_Mobile Devices Support.
- Annexure B.7. SLA\_SoW\_Printer & Scanner Support.
- Annexure B.8. SoW\_Zonal Support.
- Annexure C. SoW\_Comprehensive AMC.
- Annexure E. SoW\_WAN Connectivity
- Annexure F. SBIL Consumables Rate Discovery

## 1. DELIVERABLES:

The vendor will perform the activities at SBI Life offices as per Scope of Work mentioned in Annexure B.1 to B.8. The deliverables consist of 4 major sections as below:

- i) Central Support Team to provide IT support to branch offices remotely. Unresolved calls through remote support to be dispatched to field FMS support through arrangement of on-site support. The deliverables and resource requirements will be as per Scope of work as per Annexure- B.1, Annexure- B.2 and Annexure- B.3.
- ii) Onsite engineers at 27 locations of SBI Life. (27 RPC & RO locations). The deliverable and resource requirements are as per Annexure- B.4. The locations can increase or decrease depending upon requirement during the tenure of the agreement.
- iii) Onsite comprehensive AMC support for IT assets across India including complete vendor management of all IT assets procured by SBI Life and all assets under warranty. Deliverable are as per Annexure-C (Comprehensive AMC).
- iv) Audit & IT Security Compliance Management Deliverables are as per requirement defined in Annexure B.5 SoW\_Audit & IT Security Compliance Management and Mandatory Information Security Requirements
- v) Offsite Mobile devices support deliverables as per Annexure B.6
- vi) On site Printer & Scanner Support deliverables as per Annexure B.7.
- vii) Zonal Support As per Annexure B.8

## 2. CENTRAL SUPPORT TEAM (CST) & FIELD SUPPORT:

The Central Support team consist of Mobile devices support, Compliance, Printer & Scanner support. The selected Bidder have to maintain the resource count on the basis of call volume, technical expertise of support team and from service desk. During the contract, the resource count may be increase or decrease depending upon call volume. This will be the prerogative of the vendor to achieve the SLA and SBI Life will be measuring the SLA only. The following team members will be stationed at SBI Life premises:

- 1 Project Leader.
- 2 2 L2 Team Leaders.
- 3 2 L1 & 1 L2 compliance support,
- 4 1 L1 Printer & Scanner support.
- 5 4 L1 Zonal Team

Detailed Scope of work for CST & field– FMS support is elaborated in Annexure B.1, B.2, B.3, B.5, B.6 , B.7 & B.8 are applicable to AMC & Warranty IT assets. Key summary points are mentioned as below

- First call resolution (FCR) for Incident and Service request calls from Remote Support is to be 85% or more.
- Same day on site resolution to be provided to the branches where onsite resource is present in the branches. Any deviation to onsite resolution will be treated as a breach and penalized as per penalty clause.
- Installation, update and upgrade of OS & security patches, during first installation and rebuild during troubleshooting. If rebuild requires then backup and restoration of user data (e.g. OS upgrade windows 10 to windows 11).
- Endpoint operational application support for installation, update, upgrade and troubleshooting of Antivirus software, DLP, NAC Agent, BMC Agent, DCT Agent,

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MS Office, Office 365, bitlocker configuration, messaging client (Lotus Notes, outlook web-client etc.) or in use application for desktop and laptop. This list of software is comprehensive but not exhaustive and there can be more software added to the list in future as per the requirement of the organization.

- Understanding local LAN cabling issues up to network switch level and troubleshooting support. This will also include providing additional support for re-cabling as and when required, for which separate commercial approval on a case-to-case basis will be required.
- Bidder has to arrange engineer for disconnection & reconnection with power ON of IT assets, network and IT security equipment's under warranty & AMC (E.g. Router/Switch/ /Desktop/Printer, Scanners etc.) in case of asset shifting from one branch to another or in shifting in new premises upon advance 2-day intimation request will be placed by SBI Life.
- On-site field support to CNST- Central Network Support team for outage of link if required for testing on router or on LAN, CAST or any other central team during any outage
- Onsite service support for installation, configuration and troubleshooting of VPN client, NAC Client and any other clients (Software based / device based).
- The Bidder should deploy manpower at their site for remote infrastructure management of the PCs, Laptops, Printers and other IT equipment's (including network & IT security) under warranty & AMC in approximately 1,082 + branches. It should be noted that the aforesaid numbers can undergo change due to change of location, split-up of offices and / or incorporation / opening of new offices. Apart from this there can be mobile Laptop users who may sit at SBIL offices who would also be covered under the ambit of this support.
- It is expected that the Remote team would take control of the devices connected on the network at the remote location for the purpose of debugging and diagnosing the problem and resolve the same as a first call effort. If the first call effort undertaken fails, it is expected that the Bidder would arrange for engineer dispatch to the location for early closure of the call within the stipulated time limits mentioned in SLA at NO extra cost.
- It should also include:
  1. ~~SBI Life~~ Installation of Operating System upgrades at least once in a year as per OEM recommendation of windows security patches, as approved by appropriate authority in
    - Installing version upgrades of existing software's
    - Anti-virus installation or subsequent upgrades.
    - Re-installing or re-configuring the anti-virus, in case auto updating.
    - Any agent installation, configuration & troubleshooting (BMC, DLP, NAC, VPN, ZSCALER etc.)
- Onsite service support for domain & network migration as and when required.
- Domain addition /migration/ deletion /workgroup management of end assets should be done as required or asked by SBIL.
- All audit findings of branches have to be closed with high priority.
- All Preventive Maintenance to be done physically once in quarter.
- Knowledge base management – Frequently Asked Questions and Known Error Database. Known error database to be given by Vendor for frequently occurring problems / known errors.
- Wherever asset is found in SBI Life branches, first support to be provided upon call logging irrespective of asset is there in the asset list or not.
- Bidder has to update asset inventory in case of replacement of any asset under AMC & Warranty support, update to SBI Life. Support to be continued as per the existing assets. (Total count of assets remains unchanged only the serial number may differ).
- On-site FMS support to be provided for warranty assets supplied by SBI Life – procurement team in branches across India. Please refer **Annexure A** (Master inventory) for the warranty asset details, expected growth of warranty assets are 15%

annually and new branches is 10% per annum. Support to be provided as per the SoW mentioned in RFP.

- Bidder has to arrange engineer as and when support is required for connection of projector and video conferencing devices during top management meet across India.
- Any other IT related activity for which the Vendor would be duly guided and / or trained by SBI Life.
- If Any call is raised for IT assets available in branch office, the engineer should visit the branch & provide the resolution without any additional cost to SBIL.

### 3. RESOURCE AVAILABILITY AND CRITERIA:

- All head counts of Resident Engineers and onsite support staff should be maintained through the life cycle of contract period irrespective of leaves being granted, pre-approved or in cases of any exigencies. Head count maintain based on past experience and call ratio.
- RE, TL & PM leaves should be approved by SBI Life official. All short and long leaves should be pre-approved. Backup resource should be provided with equivalent skill and experience.
- Leaves for more than a week's time should be pre-approved one-week times and backup resource should report on site before one day and take handover from relievers'
- It is mandatory to conduct and submit Background (BG) verification of every supplied resource at SBIL site.
- It is mandatory and in the scope of bidder to ensure that all their resources are trained as per scope of work and oriented with the work culture of SBI Life.
- It is mandatory for Bidder to conduct training in every quarter of their resource to ensure adoption of best practices, current trends, and compliance requirement of SBIL and avoidance of any material breach or damage.
- SBIL reserves right to increase or decrease the number of Resident Engineers by giving one-month prior notice at any location. For addition /deletion of resource the same rate as quoted in RFP will prevail.
- For all employees, be it resident engineer or staff resident at vendor premises the laws of the land including the Labour laws will be complied with and the shortlisted Bidder undertakes to comply with the same and absolve SBI Life from any resultant implication arising out of violation of the same.

**Resource criteria for Central support team are as mention below.**

|                                   | <b>Project Leader</b>                                                        | <b>Team Leader</b>                                                           | <b>Centralized IT Service desk</b>          | <b>Remote Engineer</b>                                                       |
|-----------------------------------|------------------------------------------------------------------------------|------------------------------------------------------------------------------|---------------------------------------------|------------------------------------------------------------------------------|
| <b>Contract Period</b>            | As per RFP                                                                   | As per RFP                                                                   | As per RFP                                  | As per RFP                                                                   |
| <b>Mode of Delivery</b>           | On site                                                                      | On site                                                                      | OFF Site                                    | OFF Site                                                                     |
| <b>Qualification of Resources</b> | Diploma/ Degree / B Tech from Engineering or Graduation from Computers field | Diploma/ Degree / B Tech from Engineering or Graduation from Computers field | Any Graduation from Computers field         | Diploma/ Degree / B Tech from Engineering or Graduation from Computers field |
| <b>Certification</b>              | ITIL V4.0 - Service delivery is mandatory, PMP would be added advantage      | ITIL V4.0 foundation is mandatory                                            | ITIL4.0 foundation would be added advantage | Any certification related to hardware and network would be added advantage   |
| <b>Services window</b>            | As per RFP clause no 9.                                                      | As per RFP clause no 9.                                                      | As per RFP clause no 9.                     | As per RFP clause no 9.                                                      |

|                        |                                                                                                                                                                  |                                                                                                                                                                                                                        |                                                                                                                  |                                                                                                                                                         |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Onsite Resource</b> | 1 No. of Onsite resource required at Belapur-SBI Life                                                                                                            | 2 Nos. of Onsite resource required at Belapur-SBI Life (1 CST Team Lead and 1 Resident Engineer Team Lead)                                                                                                             |                                                                                                                  |                                                                                                                                                         |
| <b>Experience</b>      | Overall 8 + years (Relevant PM experience of 5 years)                                                                                                            | Overall 5 + Years (Relevant TL experience of 2 years)                                                                                                                                                                  | 2 + Year                                                                                                         | 2 + Year                                                                                                                                                |
| <b>Eligibility</b>     | All resources will be screened by SBIL & if found suitable then only accept for services                                                                         | All resources will be screened by SBIL & if found suitable then only accept for services                                                                                                                               | All resources will be screened by SBIL & if found suitable then only accept for services                         | All resources will be screened by SBIL & if found suitable then only accept for services                                                                |
| <b>SOW</b>             | End to End service delivery including the management of Resources in CPC and branches, remote support mgmt., field, AMC, Warranty support, audit and compliance. | End to end solution provider to end user to maintain uptime, leader for execution of technical activities carried out, Improvement on faster resolution and to maintain TAT. Annexure B.5. Annexure B.7. Annexure B.8. | Refer Attachments Under Annexure B.2. SoW_Centralized IT Service Desk. Annexure B.6. SoW_mobile devices Support. | Refer Attachments Under Annexure B.1. SoW_Remote Support Engineer Annexure B.5. SoW_Audit & IT Security Compliance Management and Mandatory Information |
| <b>Location</b>        | Belapur – SBI Life                                                                                                                                               | Belapur – SBI Life                                                                                                                                                                                                     | Bidder's Site                                                                                                    | Bidder's Site                                                                                                                                           |
| <b>Category *</b>      | Skilled                                                                                                                                                          | Skilled                                                                                                                                                                                                                | Skilled                                                                                                          | Skilled                                                                                                                                                 |

**Resources Criteria for Onsite Resident Engineer support in Regional Office, Processing Centre**

|                                   |                                                                                                                                                                                                               |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Type of services</b>           | <b>Branch IT Support</b>                                                                                                                                                                                      |
| <b>Contract Period</b>            | As per RFP                                                                                                                                                                                                    |
| <b>Mode of Delivery</b>           | On-Site                                                                                                                                                                                                       |
| <b>Qualification of Resources</b> | Degree or Diploma from Engineering & Computers field or Graduate in any stream with adequate experience in handling the IT Support                                                                            |
| <b>Certification</b>              | Any Microsoft certificate with relevant experience will be added advantage.                                                                                                                                   |
| <b>Service Window</b>             | 9 am to 9 pm*6 days. Extended hours or support on working or holidays as per SBIL Business requirement.                                                                                                       |
| <b>Onsite 41 Resources</b>        | 30 onsite engineers at RO & RPC.<br>2 Team Leaders,<br>2 L1 Compliance engineer<br>1 L2 compliance engineer,<br>1 L1 printer & scanner support<br>1 Project manager at CPC Belapur.<br>4 L1 Zonal Coordinator |

|                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Experience of the resources</b> | <ul style="list-style-type: none"> <li>L1 Engineer – 2 years + relevant certifications will be added advantage (i.e. ITIL)</li> <li>L2 Engineer – 4 + relevant certifications will be added advantage (i.e. ITIL)</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Eligibility</b>                 | All resources will be Screened by SBIL & if found suitable then only hired by Bidder.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Locations</b>                   | <ol style="list-style-type: none"> <li>1. Bhubaneswar RO/PC</li> <li>2. Guwahati RO</li> <li>3. Guwahati RPC</li> <li>4. Kolkata RO</li> <li>5. Kolkata RPC</li> <li>6. Lucknow RO</li> <li>7. Lucknow RPC</li> <li>8. Patna RO</li> <li>9. Patna RPC</li> <li>10. Chandigarh RO</li> <li>11. Chandigarh RPC</li> <li>12. Delhi PC</li> <li>13. Delhi RO</li> <li>14. Jaipur RO/RPC</li> <li>15. Chennai RO/RPC</li> <li>16. Cochin RPC (Kerala)</li> <li>17. Hyderabad RO</li> <li>18. Hyderabad RPC</li> <li>19. Trivendrum RO</li> <li>20. Vijayawada RO/RPC</li> <li>21. Ahmedabad RO/RPC</li> <li>22. Bangalore RO</li> <li>23. Bangalore RPC</li> <li>24. Bhopal RPC</li> <li>25. Bhopal RO</li> <li>26. Mumbai RO/RPC</li> <li>27. Maharashtra RO/RPC</li> </ol> |
| <b>SOW</b>                         | Refer Attachments Under Annexure B.4 Onsite support at Processing Center, Regional Offices. Annexure B5 for Compliance & B.7 for Scanner & Printer Support                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Category*</b>                   | Skilled                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

\* The Category of the resource is meant towards compliance to the Labour Laws and the bidder should necessarily comply to the Wages Act / Labour Laws / PF and ESI regulations prevailing in the area where the services are being provided. A declaration to this effect is to be provided as a part of the proposal in the format mentioned below: Annexure – G: Format to be printed on letter head, signed and stamped.

#### **4. SLA & Penalty Terms:**

The success of service level agreements depends fundamentally on the ability to measure performance comprehensively and accurately so that credible and reliable information on the service provided can be made available to customer and support areas.

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Service factors must be meaningful, measurable and monitored constantly. Actual levels of service are to be compared with agreed target levels on a regular basis by SBI Life - IT.

Service level monitoring will be performed by SBI Life-IT on a daily basis and reports produced and reviewed on a monthly basis.

- The Penalty will be imposed in case of non-compliance to the SLA against each service type.
- SLA / Penalty will be discussing and calculate in monthly review meeting and calculation will be finalize on quarterly base invoice with summary of three months SLA.
- SLA will be measured for each service type independently and accordingly penalties will be imposed as defined however overall penalty is capped to 10% of quarterly invoice.
- Any violation mentioned response and resolution time will be counted on default on SLA. All the defaults at month end will then be calculated to arrive at applicable proportionate penalty, on breaching agreed up-time by VENDOR.
- SBI Life will levy penalty on default in percentage proportionate to arrive at penalty amount not exceeding maximum of 10 % of quarterly payable fees and maximum tolerance to permissible breach is 5% of mutually agreed grace default for one month.
- In event of permissible breach occurrence for consecutive 3 months may call for management review by SBI Life (VP and above) and VENDOR (Country head or vertical head) for review and commitment for service improvement within next 30 days otherwise contract may be cancelled and PBG will be in-cashed.
- Penalties for each Scope of work to be calculated on the basis of SLA/ TAT/ Response/ Resolution mentioned in that RFP and same will be calculated basis on each service.
- Bidders Back office team of experts will be supporting the on-site resource all time & if Severity I problem occurs & the problem not resolved within 30 min then Bidders back office expert should visit the site within 2 hours.

| Sr. No | Service Type                           | Agreed SLA                                                                                                                                | Penalty                                                                                                                                                                                                                                                                                                              |
|--------|----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1      | Centralized IT Service Desk            | 99% calls to be handling, logging and assigning as per defined TAT defined in Annexure B.2. & Annexure B.6                                | For each breach of SLA will lead to penalty. For every 1% in SLA breach below agreed SLA (99%), penalty will be 1% of quarterly billing value of. Maximum penalty applicable up to 5% on quarterly billing value of AMC support. Calculation will be done on the basis of our inbound call center tool and ITSM tool |
| 2      | Remote Support Calls                   | 85 % Calls to be resolved as per TAT productivity in Annexure B.1                                                                         | For each breach of SLA will lead to penalty. For every 1% in SLA breach below agreed SLA (85%), penalty will be 1% of quarterly billing value. Maximum penalty applicable up to 5% on quarterly billing value of AMC support.                                                                                        |
| 3      | Comprehensive AMC / Soft Support calls | 99% Onsite comprehensive AMC and Soft (FMS) support calls to be responded on same day and resolution to be provided on next business day. | <ul style="list-style-type: none"> <li>• For Printer and scanner (Soft &amp; Hardware calls) - A penalty of Rs 500/- per day will be levied by the SBI Life on the company for failure to resolve an incident or provide standby for downtime exceeding SLA commitment.</li> </ul>                                   |

|   |                                                                       |                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|---|-----------------------------------------------------------------------|-------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|   |                                                                       |                                                                   | <ul style="list-style-type: none"> <li>For Desktop / Laptop (Soft &amp; Hardware calls) -<br/>A Penalty of Rs 200/- per day will be levied by the SBIL on the Company for failure to resolve an incident or provide standby for downtime exceeding SLA.<br/>The penalties will be for the delay on daily basis beyond the stipulated downtime is applicable maximum up to 10% on the quarterly billing value of AMC Support</li> </ul> |
| 4 | Onsite support at Processing Centers, Regional Offices                | 99 % calls are to be closed in as per defined TAT in Annexure-B.4 | For each breach of SLA will lead to penalty. For every 1% in SLA breach below agreed SLA (penalty will be 1% of quarterly billing value of FMS support. Maximum penalty applicable up to 5% on quarterly billing value of FMS support)                                                                                                                                                                                                 |
| 5 | Preventive Maintenance (PM)                                           | 100 % PM to be done in 90 days cycle                              | Penalty of Rs. 500/- per asset (desktop / laptop) will be imposed by the SBI Life on the service provider for failure to complete quarterly preventive maintenance of all IT assets available in branch. Maximum penalty applicable up to 10% on quarterly billing value of AMC Support.                                                                                                                                               |
| 6 | Redundant WAN connectivity                                            | 99.9% uptime of redundant WAN connectivity.                       | Rs. 20,000/- per hour for uptime <99.9% Maximum up to 10% of quarterly contract value AMC support.                                                                                                                                                                                                                                                                                                                                     |
| 7 | Resource Availability                                                 | 100% attendance to be complied                                    | Any short fall of resource will be penalized to double amount of per day payout and calculated on Monthly basis. Backup resource to be available at site within 2 hrs. else we consider as absent and accordingly penalty will be applicable.                                                                                                                                                                                          |
| 8 | Audit & IT Security Compliance Management Services for Desktop/Laptop | 100% adherence to audit points                                    | <p>Inspection and Audit team carry out the branch audit on quarterly basis as per the check list provided in Annexure B5</p> <p>Penalty of Rs. 500/- per asset (desktop / laptop) will be imposed by the SBI Life on the service provider for failure to meet the compliance with quarterly audit. Maximum penalty applicable up to 10% on quarterly billing value of AMC Support.</p>                                                 |

Exclusion - Any consumable for which approval is required from SBI Life, Physical Damage



**Severity definition for Incidences.**

| Type of Severity                | Definition                                                                                                                                                                                                                                                                                                                                                                       | Response Time            | Resolution Time          |
|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| S1 - High                       | An incident that affects entire site or all users in a specified branch, Processing Centre or DR site. E.g. Server Down, domain controller down, Server Virus attack, an incident that affects a VIP user. Critical system component failed severe business disruption. (Approximate 130+ VIP Users across India and list will be shared on the 1 <sup>st</sup> day of contract) | Refer the respective SOW | Refer the respective SOW |
| S2 - Medium                     | An incident that affects a group of users. Major business disruption. Impacting services provision of business / financial loss                                                                                                                                                                                                                                                  | Refer the respective SOW | Refer the respective SOW |
| S3- Low                         | Minor disruption. An incident / service request that affects a single user.                                                                                                                                                                                                                                                                                                      | Refer the respective SOW | Refer the respective SOW |
| S4- Planned Activity / projects | These are basically the planned tasks, which might involve multi vendors and are expected to take time to complete the tasks                                                                                                                                                                                                                                                     |                          |                          |

\* Excluding dependency on external factors.

**For calculating SLA, the following matrix will be used:**

| Sr. No | Service Type                                           | Agreed SLA | Achieved SLA in quarter (Average of three months) |
|--------|--------------------------------------------------------|------------|---------------------------------------------------|
| 1      | Centralized IT Service Desk                            | 99%        |                                                   |
| 2      | Remote Support Calls                                   | 85%        |                                                   |
| 3      | Comprehensive AMC / Soft Support calls                 | 99%        |                                                   |
| 4      | Onsite support at Processing Centers, Regional Offices | 99%        |                                                   |
| 5      | Preventive Maintenance (PM)                            | 100%       |                                                   |
| 6      | Redundant WAN connectivity                             | 99.9%      |                                                   |

**Measurement Matrix**

**Response time**

$[(\text{No. of incidents \& service request responded within stipulated response time}) / (\text{Total number of incident \& service requests received in month})] * 100$

**Resolution time**

$[(\text{No. of incidents \& service request resolved within stipulated response time}) / (\text{Total number of incident \& service requests received in month})] * 100$

**Performance Management**

Customer C-SAT survey will be conducted by SBI Life every half yearly to measure satisfaction of given services and Bidder has to achieve 4 overall score on the scale of 1 to 5 where 1 is poor support and 5 is excellent. Performance below 3 is not acceptable and calls for review with higher management meeting of Bidder.

## 5. SUPPORT WINDOW:

### Support Window (Service Coverage)

Off-site Resource: Monday to Saturday: 9:00 AM to 9:00 PM

Onsite Resource: Monday to Saturday: 9:30 AM to 7:30 PM.

- SBIL may require a larger time window as per SBIL business requirement including holidays & month ends for which prior notice will be given by SBIL.
- Business critical months, 24x7 services: Additional Resources for the business-critical months may require enabling support business needs.
- The Support team would be working on all working days of SBI Life irrespective of the vendor's holiday list.

## 6. PROJECT TRANSITION:

Bidder should have to arrange their transition team at least two months prior to the last date (31-March-2025) of existing service provider.

The rates for the transition period will be as per the discovered rates for first year as per the manpower supplied. Takeover process includes below terms:

- Technical knowledge.
- SBI Life Policy and process for service delivery.
- To understand IT audit and security compliances.
- To awareness of SBI Life functions and their management.
- To understand the critical applications/ users / business impacts / etc.

## 7. ESCALATION MECHANISM:

The Escalation matrix will be followed in case of any issues/problems not resolved within the acceptable service level agreements.

| Level | Escalation Level 1        | Escalation Level 2                | Escalation Level 3        | Escalation Level 4        |
|-------|---------------------------|-----------------------------------|---------------------------|---------------------------|
| S1    | Escalation within 30 Min  | Escalation after 1 Hour           | Escalation after 2 Hours  | Escalation after 3 Hours  |
|       | Program Manager           | Regional Service Delivery Manager | Regional Business Manager | Head- Services            |
| S2    | Escalation within 1 Hours | Escalation after 4 Hours          | Escalation after 8 Hours  | Escalation after 16 Hours |
|       | Program Manager           | Regional Service Delivery Manager | Regional Business Manager | Head- Services            |
| S3    | Escalation within 2 Hours | Escalation after 6 Hours          | Escalation after 12 Hours | Escalation after 24 Hours |
|       | Program Manager           | Regional Service Delivery Manager | Regional Business Manager | Head- Services            |

|           |                                                                                                                                   |
|-----------|-----------------------------------------------------------------------------------------------------------------------------------|
| <b>S4</b> | Any activities need to be mutually planned with deadline. Escalation every after one business day as per the level defined above. |
|-----------|-----------------------------------------------------------------------------------------------------------------------------------|

## 8. ANNEXURE:

Annexure A. Master inventory  
 Annexure B.1. SoW\_Remote Support Engineer  
 Annexure B.2. SoW\_Centralized IT Service Desk  
 Annexure B.3. SoW\_Vendor Management  
 Annexure B.4. SoW\_Onsite support at Processing Center, Regional Offices  
 Annexure B.5. SoW\_Audit & IT Security Compliance Management and Mandatory Information Security Requirements.  
 Annexure B.6. SoW\_Mobile devices Support.  
 Annexure B.7. SLA\_SOW\_Printer & Scanner Support.  
 Annexure B.8. SoW\_Zonal\_coordinator\_  
 Annexure C. SoW\_Comprehensive AMC.  
 Annexure D.1 Branch Address Details for Support.  
 Annexure D.2 Preventive Maintenance Guidelines.  
 Annexure D.3 Commercial Format.  
 Annexure E. SoW\_WAN Connectivity  
 Annexure F. SBIL Consumables Rate Discovery

## 9. Payment Schedule

Quarterly at the end of the quarter.  
 Invoice payment will happen after 30 days' post submission of error free no query invoice.

**Appendix-F**

**Commercial Bid**

Commercial Bid should be submitted strictly as per the Commercial Format as provided in **Annexure D.3** of **Appendix E** of the RFP.

The data should be filled in the '.xls' sheet in Unit value. Data is populated for uniformity in format however formulas of the sheet has to be verified by Bidder for correctness. Bidder has to print, sign and submit hard copy of commercial bid. The Commercial Bid shall be submitted in a separate envelope which the Bidder should mark as "Commercial Bid".

All rates would be fixed for the period of 5 years from the date of the Contract. The Bid may not be evaluated by SBIL in case of non-adherence to the format or partial submission of technical details as prescribed in this RFP.

SBIL shall not allow/permit changes in the technical specifications once it is submitted. The relevant product information, brand and model number offered, printed product brochure, technical specification sheets etc. should be submitted along with the offer. Failure to submit this information along with the offer could result in disqualification. All sections should be labelled for easy reference.

**Appendix-G**

**Contract / Service Agreement (Template)**



Service Agreement -  
Format.docx

**Appendix-H**

*Format of 'Non-Disclosure Undertaking' for RFP  
(To be executed on Rs. 800/- stamp Paper)*

**CONFIDENTIALITY CUM NON-DISCLOSURE UNDERTAKING**

This Non-Disclosure Undertaking ("Undertaking") is made and entered into this \_\_\_\_\_ day of \_\_\_\_\_, Two Thousand Twenty \_\_\_\_\_

**By:-**

\_\_\_\_\_, a company incorporated under the Companies Act, 1956 having its PAN - \_\_\_\_\_ and registered office at \_\_\_\_\_ (hereinafter referred to as the "**Bidder**" which expression shall unless it be repugnant to the meaning or context thereof, be deemed to mean and include its successors and permitted assigns)

**OR**

\_\_\_\_\_, a partnership firm registered under the Indian Partnership Act, 1932, having its PAN - \_\_\_\_\_ and its office at \_\_\_\_\_ (hereinafter referred to as the "**Bidder**" which expression shall unless it be repugnant to the meaning or context thereof, be deemed to mean and include its partners and their respective heirs, executors, administrators and permitted assigns of the last surviving partner)

**OR**

\_\_\_\_\_, a limited liability partnership, registered under the Limited Liability Partnership Act, 2008, bearing LLPIN No. \_\_\_\_\_, having PAN - \_\_\_\_\_ and its registered office at \_\_\_\_\_ (hereinafter referred to as the "**Bidder**" which expression shall, unless it be repugnant to the meaning or context thereof, be deemed to mean and include its successors and permitted assigns)

**IN FAVOUR OF**

**SBI Life Insurance Company Ltd.**, a company incorporated under the Companies Act, 1956 having its registered office at "Natraj", 8th Floor, M.V. Road & Western Express Highway Junction, Andheri (East), Mumbai- 400069 (hereinafter referred to as the "**SBI Life**" which expression shall unless it be repugnant to the meaning or context thereof, be deemed to mean and include its successors and assigns).

**WHEREAS**, SBI Life has provided certain proprietary and confidential information, concerning its products, service, organization, its employees, employee's details, decision processes, strategic business initiatives, technical infrastructure, working processes, delegation of responsibilities, project management, planning methods, reports, plans and status including but not limited to technical manuals, specifications, product features, customer list, specializations, documents, financial statements and business/development plans etc. to the Bidder to facilitate Bidder's response to its Request For Proposal ("RFP") for hiring of consultant for assessment of existing Project management practices across

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departments in SBIL and identification of improvement opportunities and provide roadmap to establish a centralized Project Management Office (PMO) function. The consultant shall also make recommendations for the tools / techniques / applications / software to be used to achieve the above purpose. The consultant shall be instrumental in establishing the centralized PMO and shall provide handholding for an agreed timeframe after the implementation of the centralized PMO.

**NOW, THEREFORE**, in consideration thereof, the Bidder agrees and undertakes to:

- hold all the proprietary and confidential information received from SBI Life in confidence and will not disclose such information to any third party.
- use such information only for the purpose of responding to the RFP.
- restrict disclosure of such information to its employees who are having a need to know and inform such employees of the obligations assumed herein.
- not disclose such information to any third party without the prior written approval of SBI Life.
- protect the proprietary and confidential information received from SBI Life with at least the same degree of care as it normally exercise to protect its own proprietary and confidential information of similar nature.
- ensure that Bidder's employees will not disclose any information so received even after they cease to be employees of the Bidder.
- Ensure destroying/purging of any confidential data received from SBI Life at the earliest of the closure of the bidding process or on the Bidder getting eliminated from the bidding process.

The Bidder shall indemnify SBI Life, its directors, officers, employees, subsidiaries and /or affiliates and hold them harmless against any loss or damage that SBI Life, its directors, officers, employees, subsidiaries and /or affiliates may sustain on account of any leakage of confidential information pertaining to and supplied by SBI Life or on account of any violation of intellectual property, confidentiality, privacy, patents, trademark etc., by the Bidder in respect of any Intellectual Property, practices, hardware, software, systems, process, technologies, etc. in whatever manner described.

**IN WITNESS WHEREOF**, the Bidder has caused this undertaking to be executed as of the date set forth above.

For <Bidder Name >

Authorised Signatory seal:- \_\_\_\_\_

Name of Authorised Signatory: - \_\_\_\_\_

Designation: - \_\_\_\_\_

**Appendix-I**

**Pre-Bid Query Format**  
**(To be provide strictly in Excel format)**

| <b>Bidder Name</b> | <b>Sl. No</b> | <b>RFP Page No</b> | <b>RFP Clause No.</b> | <b>Relevant extracts of respective Clause</b> | <b>Query/Suggestions</b> |
|--------------------|---------------|--------------------|-----------------------|-----------------------------------------------|--------------------------|
|                    |               |                    |                       |                                               |                          |
|                    |               |                    |                       |                                               |                          |
|                    |               |                    |                       |                                               |                          |
|                    |               |                    |                       |                                               |                          |



**Appendix-J**

**Format for Submission of Client References**

| Particulars                                            | Details |
|--------------------------------------------------------|---------|
| <b>Client Information</b>                              |         |
| Client Name                                            |         |
| Client address                                         |         |
| Name of the contact person and designation             |         |
| Phone number of the contact person                     |         |
| E-mail address of the contact person                   |         |
| <b>Project Details</b>                                 |         |
| Name of the Project                                    |         |
| Start Date                                             |         |
| End Date                                               |         |
| Current Status (In Progress / Completed)               |         |
| <b>Size of Project</b>                                 |         |
| Value of Work Order (In Lakh) (only single work order) |         |
|                                                        |         |

**Name & Signature of authorized signatory**

**Seal of Bidder**

**APPENDIX -K****BANK GUARANTEE FORMAT**  
***(TO BE STAMPED AS AN AGREEMENT)***

1. THIS BANK GUARANTEE AGREEMENT executed at \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_ 202 by \_\_\_\_\_ (Name of the Bank) \_\_\_\_\_ having its Registered Office at \_\_\_\_\_ and its Branch at \_\_\_\_\_ (hereinafter referred to as "the Guarantor", which expression shall, unless it be repugnant to the subject, meaning or context thereof, be deemed to mean and include its successors and permitted assigns) IN FAVOUR OF SBI Life Insurance Co. Ltd., a Company incorporated under the Companies Act, 1956 having its Registered Office at "Natraj", M.V. Road & Western Express Highway Junction, Andheri (East), Mumbai- 400069 , hereinafter referred to as "SBIL" which expression shall, unless repugnant to the subject, context or meaning thereof, be deemed to mean and include its successors and assigns).
2. WHEREAS M/s \_\_\_\_\_, incorporated under \_\_\_\_\_ Act having its registered office at \_\_\_\_\_ and principal place of business at \_\_\_\_\_ (hereinafter referred to as "Service Provider/ Vendor" which expression shall unless repugnant to the context or meaning thereof shall include its successor, executors & permitted assigns) has agreed to supply of hardware/software and/ or services (hereinafter referred to as "Services") to SBIL in accordance with the Request for Proposal (RFP) No. **SBIL:xx:nn** dated **dd/mm/yyyy** including its corrigenda, if any.
3. WHEREAS, SBIL has agreed to avail the Services from Service Provider for a period of \_\_\_\_\_ year(s) subject to the terms and conditions mentioned in the RFP.
4. WHEREAS, in accordance with and in furtherance to the terms and conditions of the above referred RFP , Service Provider is required to furnish a Bank Guarantee for a sum of Rs. \_\_\_\_\_/- (Rupees \_\_\_\_\_ only) for due performance of the obligations of Service Provider in providing the Services, in accordance with the RFP guaranteeing payment of the said amount of Rs. \_\_\_\_\_/- (Rupees \_\_\_\_\_ only) to SBIL, if Service Provider fails to fulfill its obligations as agreed in RFP.
5. WHEREAS, the Bank Guarantee is required to be valid for a total period of \_\_\_\_\_ months and in the event of failure, on the part of Service Provider, to fulfill any of its commitments / obligations under the RFP, SBIL shall be entitled to invoke the Guarantee.

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AND WHEREAS, the Guarantor, at the request of Service Provider, agreed to issue, on behalf of Service Provider, Guarantee as above, for an amount of Rs.\_\_\_\_\_/-(Rupees \_\_\_\_\_ only).

**NOW THIS GUARANTEE WITNESSETH THAT**

1. In consideration of SBIL having agreed to entrust Service Provider for rendering Services as mentioned in the RFP, we, the Guarantors, hereby unconditionally and irrevocably guarantee that Service Provider shall fulfill its commitments and obligations in respect of providing the Services as mentioned in the RFP and in the event of Service Provider failing to perform / fulfill its commitments / obligations in respect of providing Services as mentioned in the RFP, we (the Guarantor) shall on demand(s), from time to time from SBIL, without protest or demur or without reference to Service Provider and notwithstanding any contestation or existence of any dispute whatsoever between Service Provider and SBIL, pay SBIL forthwith the sums so demanded by SBIL not exceeding Rs.\_\_\_\_\_/-(Rupees \_\_\_\_\_ only).
2. Any notice / communication / demand from SBIL to the effect that Service Provider has failed to fulfill its commitments / obligations in respect of rendering the Services as mentioned in the RFP, shall be conclusive, final & binding on the Guarantor and shall not be questioned by the Guarantor in or outside the court, tribunal, authority or arbitration as the case may be and all such demands shall be honoured by the Guarantor without any delay.
3. We (the Guarantor) confirm that our obligation to the SBIL, under this Guarantee shall be independent of the agreement or other understandings, whatsoever, between the SBIL and Service Provider.
4. This Guarantee shall not be revoked by us (the Guarantor) without prior consent in writing from the SBIL.

**WE (THE GUARANTOR) HEREBY FURTHER AGREE & DECLARE THAT-**

- i. Any neglect or forbearance on the part of SBIL to Service Provider or any indulgence of any kind shown by SBIL to Service Provider or any change in the terms and conditions of the Contract or the Services shall not, in any way, release or discharge the Guarantor from its liabilities under this Guarantee.

- ii. This Guarantee herein contained shall be distinct and independent and shall be enforceable against the Guarantor, notwithstanding any Guarantee or Security now or hereinafter held by SBIL at its discretion.
- iii. This Guarantee shall not be affected by any infirmity or absence or irregularity in the execution of this Guarantee by and / or on behalf of the Guarantor or by merger or amalgamation or any change in the Constitution or name of the Guarantor.
- iv. The Guarantee shall not be affected by any change in the constitution of SBIL or Service Provider or winding up / liquidation of Service Provider, whether voluntary or otherwise
- v. This Guarantee shall be a continuing guarantee during its validity period.
- vi. This Guarantee shall remain in full force and effect for a period of \_\_ year(s) \_\_\_\_\_ month(s) from the date of the issuance i.e. up to \_\_\_\_\_. Unless a claim under this Guarantee is made against us on or before \_\_\_\_\_, all your rights under this Guarantee shall be forfeited and we shall be relieved and discharged from all liabilities there under.
- vii. This Guarantee shall be governed by Indian Laws and the Courts in Mumbai, India alone shall have the jurisdiction to try and entertain any dispute arising out of this Guarantee.

**Notwithstanding anything contained herein above:**

- i. Our liability under this Bank Guarantee shall not exceed Rs \_\_\_\_\_/-  
(Rs. \_\_\_\_\_ only)
- ii. This Bank Guarantee shall be valid upto \_\_\_\_\_
- iii. We are liable to pay the guaranteed amount or any part thereof under this Bank Guarantee only and only if SBIL serve upon us a written claim or demand on or before \_\_\_\_\_

**Yours faithfully,**

**For and on behalf of bank.**

\_\_\_\_\_  
**Authorised official**