



Invitation for Expression of Interest for assisting SBI Life as Project Consultant for evolving Unified Communications (UC) Platform requirements and further empanel System Integrator (SI) for installation, testing and commissioning of system

1. SBI Life Insurance Company Limited is a joint venture between the State Bank of India and BNP Paribas Assurance. It started its operations in 2001, and has a network of 16 regional offices and 900 branches and a work force of over 15000 employees located across the country. SBI Life's Corporate Office is at Mumbai.

2. **Our Vision** is to be the most trusted and preferred life insurance provider. **Our Mission** is "To emerge as the leading company offering a comprehensive range of life insurance and pension products at competitive prices, ensuring high standards of customer satisfaction and world class operating efficiency thereby becoming a model life insurance company in India in the post liberalization period." We value being Trustworthy, ambitious, Innovative, Dynamic, and in Excellence.

3. SBI Life Insurance Co Ltd invites RFP (Request for techno-commercial bid) for appointment of Project Technical Consultant/ Agency for detailed study of the existing Unified Communications (UC) Platform/ System installed at our Corporate office at Natraj Premises, Andheri (East) and other major offices in Mumbai and submit a report to arrive at suitable options with best replacement option of Unified Communications (UC) platform. The consultant will further assist SBI Life in preparing RFP, BOQ and appointing vendor/ agency to implement and operate selected solution system. The entire project will be executed within stipulated timelines.

4. Interested Consultant/ Agency should submit their details (Technical) latest by **05th Mar, 2019, 3.00 pm** in a sealed cover super scribed as " Consultant/ Agency For Unified Communications (UC) platform" addressed to the Sr Vice President -MS, Corporate Office, Natraj Premises, M V Road, Andheri (East) Mumbai-400069. The Consultant/ Agency which qualifies in the technical bid will be invited for commercial bidding.

5. Details of existing system, scope of work etc are given in succeeding paragraphs.

6. SBI Life reserve the right to reject any/ all proposal without assigning any reason whatsoever.

7. **Background.** SBI Life has one UC system to meet all the communication requirements and an additional separate communication setup for its investment dept with incoming/ outgoing call and voice recording facility. In order to improve our user productivity and enhance business processes that relate to communications and collaboration SBI Life intends to invest in a Unified Communications (UC) platform though replacement of the existing out of support life systems. The new UC solution is intended to facilitate the use of multiple enterprise communications methods to achieve improvement in user productivity by enhancing business communications and collaboration by integrating communications

channels, networks and systems, IT business applications, consumer applications and devices. The key elements of the intended UC platform will be voice, video, data, messaging and collaboration.

8. **Technical Specifications of Existing Main UC.** The technical specifications of the existing **main UC** (AVAYA G450) are given as **annexure A**. The Investment Dept, additional communication setup/ UC details may be reviewed during site visit.

9. **Certification.** SBI Life propose to engage the services of a Consultant/ Agency who will assume total responsibility for completion of the project in all respects, complaint with all regulatory guidelines (Global IT Standards and further certification by SBIL information security Team), within the specified time frame of 6 months. The best standards & solution, quality of work and timelines are the essence of the contract.

10. **Consultant RFP Details.** SBI Life now invites organizations with experience and skills for assisting SBI Life as Project Consultant for evolving Unified Communications (UC) Platform requirements and further empanel system Integrator (SI) for Installation, Testing and Commissioning of System. The purpose of the RFP is to invite techno-commercial proposals based on requirements as captured in the RFP.

11. **Commercial Proposal/ Consultant/ Agency charge.** Only **technically qualified** bidders will be invited to submit their commercial proposal in separate “Commercial Bid”. The commercial bidders are required to submit EMD of Rs 50000 with the commercial bid. The same will be communicated after completion of technical bid.

12. **Technical Bid.** Format of technical bid is enclosed herewith as **annexure B**.

a) Organizations proposing to develop the RFP should have at least five years of commercial operations/ experience. They should be registered as either Company/ LLP in India as per Companies Act.

b) They should have a proven track record of having executed more than five projects of similar or larger size and provide the client list.

c) They should be independent i.e should not be associated with any UC OEM offering products and solutions either as a channel partner (installer or integrator), or, as a distributor or reseller.

d) Further, to ensure no conflict of interest, and bias towards any specific design approach or OEM or integrator or distributor / reseller, and, to also ensure SBI Life gets to choose the best available solution platform as on date, organizations proposing to assist SBI Life with the SI empanelment and work execution will not be allowed to bid for the subsequent activity of bidding for Supply, Installation, Test and Commissioning (SITC) of the solution; either directly or through their affiliate companies. Doing so will disqualify them from the bids, award of the project, will attract penalties, disqualifications and forfeiture of any payments made anyway.

e) The organizations should have experience and skills in designing, detailing and specifying enterprise networking – Switching, Routing, SD-WAN, Cloud technologies, VoIP, UC, data centres, etc.

f) The schedule of the consultant empanelment process is as given below.

i.	Submission of Technical Proposal	From 20 th February, 2019 to 05 Mar 2019 (up to 15.00 hrs)
ii.	Last date & time of Submission of Technical Proposal.	05 Mar 2019 (15:00 Hrs.)
iii.	Site Visit	27th & 28th February, 2019
iv.	Pre Technical Bid Meeting	05 Mar 2019 (15:00 Hrs)
v.	RFP Terms and Conditions	Failure to accept the terms and conditions of the RFP at time of submitting the proposal may result in disqualification of the Consultancy/ Agency.
vi.	Validity of Proposal	Proposal must remain valid and open for the acceptance of SBI Life for 30 days from the RFP closing date. Proposals specifying shorter acceptance period will be considered nonresponsive.
vii.	Incomplete and Late Offers	Incomplete and late proposals will not be accepted. It is the Consultancy/ Agency responsibility to ensure that the proposal is submitted complete, on time and in accordance with the RFP terms and conditions. Proposals received late shall be returned back unopened.
viii.	Evaluation of Technical proposals	Evaluation process aims to select the Consultancy/ Agency whose proposal is technically fit/ responsive and at the most reasonable price.
ix.	Evaluation of financial offers	Upon completion of the technical evaluation, the financial offer, for those Consultancy/ Agency who have qualified at the technical evaluation stage, will be called.
x.	Confidentiality	The entire evaluation procedure is confidential. All proposals are for official use only and will be communicated neither to the Consultant nor to any other party.
xi.	Ownership of Proposals	The Contracting Authority retains ownership of all proposals received under this bidding procedure. Consequently, Consultancy/ Agency have no right to have their proposals returned to them.
xii.	Bid Cancellation	SBI Life has the right at any stage in the selection process to cancel the whole bid without the assigning any reason to any of the Consultancy/ Agency.
xiii.	Signature of the contract(s)	The successful appointed consultant will be notified in writing of the Award. The Consultants have one week of notification of Award to sign the final contract in the standard format as determined by the Contracting Authority. The Contracting Authority reserves the right to award all parts, partial or none of the RFP based on offer evaluation.
		SBI Life Insurance Co Ltd, reserves the right to reject any or all tenders without assigning any reason thereof

13. **Consultant Technical Requirement.** The technical qualifications of the consultant are as given below.

- a) The Consultancy/ Agency should be a current legal entity with a minimum Five years of experience in India.
- b) Financial statements i.e. Audited Balance sheet and Profit & Loss accounts for last three years will have to be submitted.
- c) Certificate from the Banker certifying that the Consultancy/ Agency is not an NPA account holder/ has not been declared bankrupt.
- d) The Consultant should have permanent office in Mumbai.
- e) At least three reputed Client References should be provided.
- f) An undertaking that, no penalties/ fines have been imposed on their entities by any Regulator or Govt Agency or any Authority for breach of any Regulations or Laws.
- g) Employer requires that Consultancy/ Agency provide professional, objective, and impartial advice and at all times hold the Employer's interests paramount, strictly avoid conflicts with other Assignment/ jobs or their own corporate interests and act without any consideration for future work.
- h) The consultancy/ Agency should have completed minimum five projects involving UC platform having the components covered in our existing UC platform in last five years.
- i) The consultancy/ Agency should arrange for the visit of the client's representatives at any their completed site.
- j) The consultancy/ Agency should have adequate technical staff to supervise the work allotted to them. The Consultancy/ Agency should have adequate experience, expertise, capabilities, and skilled personnel comprising experts in all fields related to UC platform. It should share the qualifications and experience details of its key personnel along with the technical bids.

14. **Scope of Work.** The detailed scope of work is as given below.

- a) Study the existing systems at corporate office and three main offices in Mumbai. The study aimed to understand system requirements at corporate office for replacement of two separate (Main and Investment Dept) UC systems and other three office for necessary integration.
- b) Identify the key elements to be included on to the UC platform - voice, video, data, messaging and collaboration.

- c) Perform a detailed assessment of the current data and voice network to assess the level of readiness and gaps for UC based collaboration network.
- d) Based on the assessment/ finding, draft a detailed statement of work/ multiple options to design the technical architecture of the proposed collaboration setup to be proposed, keeping in mind best practices, best solution, regulatory guidelines, information security standards, meeting long term organisational/ office needs, etc.
- e) Based on the requirements, design the setup of UC for corporate office with due considerations as given below.
 - i. Meet future communication and technology requirements of next 10 years.
 - ii. Upscaling capacity growth and user/ traffic capacity growth and redundancy with switching option.
 - iii. Complete OEM support and licences for system life of over 10 years. Provision of future updates/ patches, accessories and technical support for system life time.
 - iv. Ensure data security, integrity as per global security standards. Take periodic concurrence of data security provision arrangements being catered.
 - v. Evolve a model of five years CAMC contract with the vender to include provision of onsite technical manpower with quarterly payment system.
 - vi. Automation of all operations/ associated systems of the UC to include billing, system/ subsystem/ PRI/ fail alerts, etc.
 - vii. Evolve a buyback solution for replacement of the exiting UC at the corporate office.
 - viii. Evolve a solution of integration of the UC systems in other three main offices in Mumbai to economise on the local calling costs.
 - ix. Evolve an agreement and work timelines for empanelled SI execution work with clear penalties for any delay.
- f) Detailed specifications of the various UC components including suggested vendor names, solution configuration along with vendor(s) part number and quantity/ detailed BOQ with cost estimates to be provided.
- g) Implementation and migration/ transition plan to be included to ensure no/ minimal disturbance (execution post working hours and holidays) to the existing production network. Preparation of project implementation plan with significant milestones marked on it.

- h) A detailed functional, security, capacity and resiliency test criteria to be included as part of the RFP document. All vendor certifications applicable for the equipment, tools and design to be documented as requirement for final handover.
- i) A detailed training and implementation handover procedure to be documented to be completed as part of the overall implementation and final handover.
- j) Creation of Corporate Directory for the new architecture.
- k) Data confidentiality, integrity and retrieval– The vendor will have to ensure that the data stored in EPABX system is safe and secure and does not fall into wrong hands. Moreover, it should be easily retrievable whenever required.
- l) Set industry best standards for the operations eg regular maintenance and check schedule, data backup, data integrity and confidentiality check procedures and routine operations.
- m) The QR, functions and report generations by the vender deployed onsite manpower to be evolved.
- n) Ensure information security certification by SBI Life security Team or third party appointed by SBIL for the purpose.
- o) Post empanelment, provide a weekly/ fortnightly review at SBI Life office of the progress of work till its completion.

15. Consultancy/ Agency Fee/ Payment Terms

- a) No Advance Payment will be made.
- b) 50% payment will be released after empanelment of SI agency/ vendor for execution of work.
- c) Balance 50% payment will be released after satisfactory completion of project work as per the agreed schedule, training certification and establishing processes.

16. Delay in the Consultancy/ Agency Performance in Successfully Implementation of the Project.

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

17. Liquidated Damages. If consultancy/ Agency fails to perform services within stipulated time schedule, the SBIL shall, without prejudice to its other remedies under the contract, deduct from the contract price/ fees, as liquidated damages, a sum equivalent to 3% of the total consultancy fees for delay of each month or part thereof maximum up to 12% of contract price. Once the maximum is reached, SBI may consider termination of Contract pursuant to the conditions of contract.

18. **Conflict of Interest**

a) SBIL requires that Consultancy/ Agency provide professional, objective, and impartial advice and at all times hold SBIL's interests paramount, strictly avoid conflicts with other assignment/jobs or their own corporate interests and act without any consideration for future work

b) A Consultancy/ Agency (including its Personnel and Sub-Consultants) that has a business or family relationship with a member of the SBIL's staff who is directly or indirectly involved in any part of (i) the preparation of the Scope of work of the assignment/job, (ii) the selection process for such Assignment/job, or (iii) supervision of the Contract, may not be awarded a Contract, unless the conflict stemming from this relationship has been resolved in a manner acceptable to the SBIL throughout the selection process and the execution of the Contract.

c) Consultancy/ Agency have an obligation to disclose any situation of actual or potential conflict that impacts their capacity to serve the best interest of their Employer, or that may reasonably be perceived as having this effect. Any such disclosure shall be made as per the Standard forms of technical proposal provided herewith. If the consultant fails to disclose said situations and if the Employer comes to know about any such situation at any time, it may lead to the disqualification of the Consultant during bidding process or the termination of its Contract during execution of assignment.

19. **Acceptance or Rejection of the Bid.** SBI Life reserves the right not to accept any bid, or to accept or reject a particular bid at its sole discretion without assigning any reason whatsoever and the decision of SBI Life will be treated as final. The proposals not submitted in the prescribed format or incomplete in any sense are likely to be rejected.

20. **Non-Disclosure Agreement (NDA).** The consultancy/ Agency will have to sign a Non Disclosure Agreement (NDA) as per standard format with SBIL. Format of NDA is enclosed herewith as **annexure C**.

21. **Termination for Default.** SBIL may, without prejudice to any other remedy for breach of contract, by written notice of default sent to the Consultant, terminate the contract in whole or part: if the Consultant fails to deliver any or all of the services within the period(s) specified in the Contract, or within any extension thereof granted by the SBIL pursuant to conditions of contract or if the Consultant fails to perform any other obligation(s) under the Contract.

22. **Governing Law.** The contract shall be interpreted in accordance with the laws of India.

Details of Main UC (Avaya System)

1. The major components of Avaya EPABX system are as below.
 - a) Avaya Media server Primary - 1
 - b) Avaya Media server Secondary – 1
 - c) Avaya Media Gateway G450- 4
 - d) Avaya MG- Announcement – 4
 - e) Avaya MM710BP DS1 PRI Cards -5
 - f) Avaya MM716AP 24 ports Analog extension – 22
 - g) Telesoft Call billing software -1
2. The main features of the Avaya EPABX system are as below.
 - a) Call forwarding facility (phone/ mobile), Call park facility, Call pickup facility
 - b) Call waiting facility, Conference call facility, Call hold facility
 - c) Last number dialed (Redial) facility
 - d) Meet me conference facility
 - e) Barge-in facility (available but not yet activated)
 - f) Program backup facility
 - g) Automatic callback facility
3. Below is a brief description of the Avaya Integrated Management system and Avaya Media Gateway. Avaya Integrated Management offers a comprehensive set of web-based network and system management options that support Avaya converged voice solutions. We can also use Avaya Integrated Management to access Avaya G450 Manager. Given below is a brief of the software and hardware specifications of Avaya G450 Manager.
 - a) **Avaya G450 Technical Specifications (hardware)**
 - The G450 technical specifications include physical dimensions and tolerances of the Avaya G450 Media Gateway, power cord specifications, and media module specifications.
 - Height 5.25 in. (133.3 mm), Width 19 in. (482.6 mm), Depth 18 in. (460 mm), Weight of empty chassis 7.5 Kg. Weight of chassis with basic configuration, including main board, power supply unit, fan tray, one DSP and blank panels on the media module slots 14 Kg
 - Ambient working temperature 32 to 104 F (0 to 40C). Operation altitude up to 10,000 ft. (3000 m)
 - Front clearance -12 inches (30 cm), Rear Clearance -18 inches (45 cm)
 - Humidity 10-90% relative humidity, non-condensing. Power rating 90V-264V AC, 48-62 Hz
 - b) **Avaya EPABX System Software Specifications.** The software details of the Avaya EPABX system are as below.
 - Memory Resident: R015x.02.1.016.4
 - Disk Resident: R015x.02.1.016.4
 - c) **Current System Information**
 - Software Load: R015x.02.1.016.4
 - Memory Configuration: Standard
 - Offer Category: A
 - Platform: 25

Technical Details of the Bidders**(To be submitted in a folder with indexing and flags for each head/ item)**

Sr	Particulars	Remarks
a)	Consultancy/ Agency Details	Corporate Office, Pan India Presence (pl specify and attach evidential documents)
b)	Project lead Consultants bio-data should be submitted for evaluation of skill set of consultant.	To provide an insight into the competency.
c)	A brief high level design document to be submitted by Consultant for 600 intercom connection scalable to 1000 connection with multiple conference facility using UC features.	-do-
d)	Establishment/ Incorporation	Pl attach evidential documents
e)	Turnover (last 3 years)	Pl specify and Pl attach evidential documents
f)	Technical Staff (No & Qualification)	Pl attach evidential documents
h)	Similar projects executed in last 5 years.	Pl attach evidential documents
i)	Client Details	Pl attach evidential documents
j)	At least three reputed Client References should be provided.	Pl attach evidential documents
k)	Financial statements i.e. Audited Balance sheet and Profit & Loss accounts for last three years.	Evidential documents would be preferred.
l)	Certificate from the Banker certifying that the Consultancy/ Agency is not an NPA account holder/ has not been declared bankrupt.	Evidential documents would be preferred.

NON-DISCLOSURE / CONFIDENTIALITY CLAUSE OF AGREEMENT

1. The non-disclosure/ confidentiality agreement is as given below.
 - 1.1. The Service Provider shall use the Confidential Information solely for the purpose of carrying out the activities assigned to it.
 - 1.2. The Service Provider shall not disclose any portion of such Confidential Information coming within its possession to third parties without prior written consent of The Service Receiver.
 - 1.3. The Service Provider shall take all the reasonable steps
 - 1.3.1. to protect the secrecy of Confidential Information
 - 1.3.2. to avoid disclosure or use of Confidential Information to/by third party
 - 1.3.3. to prevent it from falling into the public domain or getting in the possession of unauthorized persons
 - 1.3.4. Further, The Service Provider would exercise highest degree of care, which a man of ordinary prudence would do to protect his own Confidential Information of the similar nature.
 - 1.4. The Service Provider shall obtain a declaration of confidentiality and commitment to hold such information in confidence, from each of its employee who is involved in the handling of Confidential Information belonging to The Service Receiver. Such declaration should also include an undertaking not to disclose the same to third parties except with the prior consent of The Service Receiver. The Service Provider shall give prior intimation to The Service Receiver in regards to any change in the personnel required to carry out the processes within 24 hours from such change.
 - 1.5. The obligation of The Service Provider in the matter of non-disclosure of Confidential Information shall remain in force at least for a period of three years even after expiry/ termination of this agreement. On expiry/ termination of this agreement, The Service Provider shall return all Confidential Information to The Service Receiver and to delete all the data whether in electronic and/or physical form from The Service Provider's systems and hand over the certificate to this effect. However, in the event of information being solicited by any department of Government or Authority under statute or court of law, The Service Receiver would provide the required clearance to The Service Provider to furnish the information within the stipulated time.
 - 1.6. The Parties acknowledge and agree that all tangible and intangible information obtained, developed or disclosed including all documents, data papers and statements and trade secret of either Party relating to its business practices and their competitive position in the market place provided to the other Party in connection with the performance of its obligations under this Agreement shall be considered to be confidential and proprietary information ("Confidential Information"). Each party acknowledges that the other party claims its Confidential Information as a special, valuable and unique asset. For itself and on behalf of its officers, directors, agents, employees, and affiliates, each party agrees that it will keep in confidence all Confidential Information and that it will not directly or

indirectly disclose to any third party or use for its own benefit, or use for any purpose other than the Purpose, any Confidential Information it receives from the other party. Each party agrees to use the same degree of care to protect the Confidential Information as it would employ with respect to its own information of like importance which it does not desire to have published or disseminated, but in no event with less than reasonable care.

1.7. Confidential Information shall not include the disclosing party's information which:

- 1.7.1. is in the public domain at the time of disclosure or later becomes part of the public domain through no fault of the Receiving Party; or
- 1.7.2. was known to the Receiving Party prior to disclosure by the Disclosing Party as proven by the written records of the Receiving Party; or
- 1.7.3. is disclosed to the Receiving Party by a third party who did not obtain such Information, directly or indirectly, from the Disclosing Party; or
- 1.7.4. is independently developed (by personnel having no access to the Information) by the Receiving Party as proven by the written records of the Receiving Party.
- 1.7.5. is required to be disclosed by Receiving Party pursuant to a requirement of a governmental agency or law so long as the Receiving Party provide Disclosing Party with timely prior written notice of such requirement to the extent permitted by law and to the extent reasonably practicable and provide all reasonable co-operation in regard to taking protective action against such disclosure requirement;

1.8. If any portion of the Confidential Information falls within any of the above exceptions, the remainder of the Confidential Information shall continue to be subject to the requirements of this Agreement.

1.9. In the event of any disclosure or loss of Confidential Information, the receiving Party shall immediately notify the disclosing Party.