



Bid Number/बोली क्रमांक (बिड संख्या):
GEM/2024/B/5129299
Dated/दिनांक : 12-07-2024

Bid Document/ बिड दस्तावेज़

Bid Details/बिड विवरण	
Bid End Date/Time/बिड बंद होने की तारीख/समय	02-08-2024 14:00:00
Bid Opening Date/Time/बिड खुलने की तारीख/समय	02-08-2024 14:30:00
Bid Offer Validity (From End Date)/बिड पेशकश वैधता (बंद होने की तारीख से)	180 (Days)
Ministry/State Name/मंत्रालय/राज्य का नाम	Ministry Of Labour And Employment
Department Name/विभाग का नाम	Na
Organisation Name/संगठन का नाम	Employees Provident Fund Organisation (epfo)
Office Name/कार्यालय का नाम	New Delhi
Item Category/मद केटेगरी	Call Centre Service - Per Seat Basis - Standard call center setup (On Prim); Onsite with setup
Contract Period/अनुबंध अवधि	1 Year(s)
Minimum Average Annual Turnover of the bidder (For 3 Years)/बिडर का न्यूनतम औसत वार्षिक टर्नओवर (3 वर्षों का)	5000 Lakh (s)
Years of Past Experience Required for same/similar service/उन्हीं/समान सेवाओं के लिए अपेक्षित विगत अनुभव के वर्ष	5 Year (s)
Past Experience of Similar Services required/इसी तरह की सेवाओं का पिछला आवश्यक अनुभव है	Yes
MSE Exemption for Years of Experience and Turnover/ अनुभव के वर्षों से एमएसई छूट	No
Startup Exemption for Years of Experience and Turnover/ अनुभव के वर्षों से स्टार्टअप छूट	No
Document required from seller/विक्रेता से मांगे गए दस्तावेज़	Experience Criteria,Bidder Turnover,Certificate (Requested in ATC),OEM Authorization Certificate,Additional Doc 1 (Requested in ATC),Additional Doc 2 (Requested in ATC),Additional Doc 3 (Requested in ATC),Additional Doc 4 (Requested in ATC) *In case any bidder is seeking exemption from Experience / Turnover Criteria, the supporting documents to prove his eligibility for exemption must be uploaded for evaluation by the buyer

Bid Details/बिड विवरण	
Bid to RA enabled/बिड से रिवर्स नीलामी सक्रिय किया	No
Type of Bid/बिड का प्रकार	Two Packet Bid
Time allowed for Technical Clarifications during technical evaluation/तकनीकी मूल्यांकन के दौरान तकनीकी स्पष्टीकरण हेतु अनुमत समय	2 Days
Estimated Bid Value/अनुमानित बिड मूल्य	125000000
Evaluation Method/मूल्यांकन पद्धति	Total value wise evaluation

EMD Detail/ईएमडी विवरण

Required/आवश्यकता	No
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ePBG Detail/ईपीबीजी विवरण

Required/आवश्यकता	No
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Splitting/विभाजन

Bid splitting not applied/बोली विभाजन लागू नहीं किया गया.

MII Compliance/एमआईआई अनुपालन

MII Compliance/एमआईआई अनुपालन	Yes
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MSE Purchase Preference/एमएसई खरीद वरीयता

MSE Purchase Preference/एमएसई खरीद वरीयता	Yes
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1. The minimum average annual financial turnover of the bidder during the last three years, ending on 31st March of the previous financial year, should be as indicated above in the bid document. Documentary evidence in the form of certified Audited Balance Sheets of relevant periods or a certificate from the Chartered Accountant / Cost Accountant indicating the turnover details for the relevant period shall be uploaded with the bid. In case the date of constitution / incorporation of the bidder is less than 3-year-old, the average turnover in respect of the completed financial years after the date of constitution shall be taken into account for this criteria.

2. Years of Past Experience required: The bidder must have experience for number of years as indicated above in bid document (ending month of March prior to the bid opening) of providing similar type of services to any Central / State Govt Organization / PSU. Copies of relevant contracts / orders to be uploaded along with bid in support of having provided services during each of the Financial year.

3. Purchase preference will be given to MSEs having valid Udyam Registration and whose credentials are validated online through Udyam Registration portal as defined in Public Procurement Policy for Micro and Small Enterprises (MSEs) Order, 2012 dated 23.03.2012 issued by Ministry of Micro, Small and Medium Enterprises and

its subsequent Orders/Notifications issued by concerned Ministry. If the bidder wants to avail themselves of the Purchase preference, the bidder must be the manufacturer / OEM of the offered product on GeM. Traders are excluded from the purview of Public Procurement Policy for Micro and Small Enterprises and hence resellers offering products manufactured by some other OEM are not eligible for any purchase preference. In respect of bid for Services, the bidder must be the Service provider of the offered Service. Relevant documentary evidence in this regard shall be uploaded along with the bid in respect of the offered product or service and Buyer will decide eligibility for purchase preference based on documentary evidence submitted, while evaluating the bid. If L-1 is not an MSE and MSE Seller (s) has / have quoted price within L-1+ 15% (Selected by Buyer) of margin of purchase preference /price band defined in relevant policy, such MSE Seller shall be given opportunity to match L-1 price and contract will be awarded for 100% (selected by Buyer) percentage of total quantity. The buyers are advised to refer the OM No. F.1/4/2021-PPD dated 18.05.2023 OM No.1 4 2021 PPD dated 18.05.2023 for compliance of Concurrent application of Public Procurement Policy for Micro and Small Enterprises Order, 2012 and Public Procurement (Preference to Make in India) Order, 2017. Benefits of MSE will be allowed only if seller is validated on-line in GeM profile as well as validated and approved by Buyer after evaluation of documents submitted.

4. Estimated Bid Value indicated above is being declared solely for the purpose of guidance on EMD amount and for determining the Eligibility Criteria related to Turn Over, Past Performance and Project / Past Experience etc. This has no relevance or bearing on the price to be quoted by the bidders and is also not going to have any impact on bid participation. Also this is not going to be used as a criteria in determining reasonableness of quoted prices which would be determined by the buyer based on its own assessment of reasonableness and based on competitive prices received in Bid / RA process.

5. Past Experience of Similar Services: The bidder must have successfully executed/completed similar Services over the last three years i.e. the current financial year and the last three financial years(ending month of March prior to the bid opening): -

1. Three similar completed services costing not less than the amount equal to 40% (forty percent) of the estimated cost; or
2. Two similar completed services costing not less than the amount equal to 50% (fifty percent) of the estimated cost; or
3. One similar completed service costing not less than the amount equal to 80% (eighty percent) of the estimated cost.

Additional Qualification/Data Required/अतिरिक्त योग्यता /आवश्यक डेटा

Scope of Work to be specified by Buyer as per Requirement:[1720769544.pdf](#)

Provisioning of ICT and Non-ICT Infrastructure:[1720769546.pdf](#)

Analytics & reporting:[1720769549.pdf](#)

Knowledge Management:[1720769554.pdf](#)

Call center Solution:[1720769558.pdf](#)

Integration required:[1720769560.pdf](#)

Automatic Call Distributor (ACD):[1720769563.pdf](#)

IVR (Interactive Voice Response) Requirement:[1720769567.pdf](#)

CTI (Computer Telephone Integration) Requirement:[1720769571.pdf](#)

Call Center Application:[1720769572.pdf](#)

Performance Monitoring:[1720769574.pdf](#)

Shift Timings and Resource description (number of resources):[1720769577.pdf](#)

Call Centre Service - Per Seat Basis - Standard Call Center Setup (On Prim); Onsite With Setup (500)

Technical Specifications/तकनीकी विशिष्टियाँ

Specification	Values
Core	
Type of Call center setup required	Standard call center setup (On Prim)
Premises	Onsite with setup
Type of Call support	Inbound , Outbound
Type of Service	Manpower , Infrastructure (Telephone, headphones, desks etc.) , Technology , MIS/Report Generation
Educational Qualification of Manpower	Graduate
Languages	Hindi , English , Assamese , Bengali , Bodo , Dogri , Gujrati , Kannada , Kashmiri , Konkani , Maithili , Malayalam , Manipuri , Marathi , Nepali , Odia , Punjabi , Sanskrit , Santhali , Sindhi , Tamil , Telugu , Urdu
Additional service	Social Media Response Team , Chat Bot support , Email Response System
Addon(s)/एडऑन	

Additional Specification Documents/अतिरिक्त विशिष्टि दस्तावेज़

Consignees/Reporting Officer/परेषिती/रिपोर्टिंग अधिकारी

S.No./क्र. सं.	Consignee Reporting/Officer/परेषिती/रिपोर्टिंग अधिकारी	Address/पता	Number of seats required per shift	Additional Requirement/अतिरिक्त आवश्यकता
1	Joginder Singh Yadav	110075,National Data Centre EPFO Complex Plot 23, Sector 23 Dwarka	500	<ul style="list-style-type: none"> Number of Months : 12 Number of Shift per day : 3 Number of Working days in Month : 30

Buyer Added Bid Specific Terms and Conditions/क्रेता द्वारा जोड़ी गई बिड की विशेष शर्तें

1. Generic

OPTION CLAUSE: The buyer can increase or decrease the contract quantity or contract duration up to 25 percent at the time of issue of the contract. However, once the contract is issued, contract quantity or contract duration can only be increased up to 25 percent. Bidders are bound to accept the revised

quantity or duration

2. Buyer Added Bid Specific ATC

Buyer Added text based ATC clauses

1. This is an Expression of Interest based on which further Request for Proposal shall be firmed up. No financials is required at this stage.
2. Clarification, if any to be sought through email addressed to: Shri Rajesh Pandey, Regional P.F. Commissioner-I, Email ID :rc.callcentre@epfindia.gov.in

Disclaimer/अस्वीकरण

The additional terms and conditions have been incorporated by the Buyer after approval of the Competent Authority in Buyer Organization, whereby Buyer organization is solely responsible for the impact of these clauses on the bidding process, its outcome, and consequences thereof including any eccentricity / restriction arising in the bidding process due to these ATCs and due to modification of technical specifications and / or terms and conditions governing the bid. If any clause(s) is / are incorporated by the Buyer regarding following, the bid and resultant contracts shall be treated as null and void and such bids may be cancelled by GeM at any stage of bidding process without any notice:-

1. Definition of Class I and Class II suppliers in the bid not in line with the extant Order / Office Memorandum issued by DPIIT in this regard.
2. Seeking EMD submission from bidder(s), including via Additional Terms & Conditions, in contravention to exemption provided to such sellers under GeM GTC.
3. Publishing Custom / BOQ bids for items for which regular GeM categories are available without any Category item bunched with it.
4. Creating BoQ bid for single item.
5. Mentioning specific Brand or Make or Model or Manufacturer or Dealer name.
6. Mandating submission of documents in physical form as a pre-requisite to qualify bidders.
7. Floating / creation of work contracts as Custom Bids in Services.
8. Seeking sample with bid or approval of samples during bid evaluation process. (However, in bids for attached categories, trials are allowed as per approved procurement policy of the buyer nodal Ministries)
9. Mandating foreign / international certifications even in case of existence of Indian Standards without specifying equivalent Indian Certification / standards.
10. Seeking experience from specific organization / department / institute only or from foreign / export experience.
11. Creating bid for items from irrelevant categories.
12. Incorporating any clause against the MSME policy and Preference to Make in India Policy.
13. Reference of conditions published on any external site or reference to external documents/clauses.
14. Asking for any Tender fee / Bid Participation fee / Auction fee in case of Bids / Forward Auction, as the case may be.
15. Any ATC clause in contravention with GeM GTC Clause 4 (xiii)(h) will be invalid. In case of multiple L1 bidders against a service bid, the buyer shall place the Contract by selection of a bidder amongst the L-1 bidders through a Random Algorithm executed by GeM system.

Further, if any seller has any objection/grievance against these additional clauses or otherwise on any aspect of this bid, they can raise their representation against the same by using the Representation window provided in the bid details field in Seller dashboard after logging in as a seller within 4 days of bid publication on GeM. Buyer is duty bound to reply to all such representations and would not be allowed to open bids if he fails to reply to such representations.

This Bid is governed by the General Terms and Conditions/सामान्य नियम और शर्तें, conditions stipulated in Bid and Service Level Agreement specific to this Service as provided in the Marketplace. However in case if any condition specified in General Terms and Conditions/सामान्य नियम और शर्तें is contradicted by the conditions stipulated in

Service Level Agreement, then it will over ride the conditions in the General Terms and Conditions.

In terms of GeM GTC clause 26 regarding Restrictions on procurement from a bidder of a country which shares a land border with India, any bidder from a country which shares a land border with India will be eligible to bid in this tender only if the bidder is registered with the Competent Authority. While participating in bid, Bidder has to undertake compliance of this and any false declaration and non-compliance of this would be a ground for immediate termination of the contract and further legal action in accordance with the laws./जेम की सामान्य शर्तों के खंड 26 के संदर्भ में भारत के साथ भूमि सीमा साझा करने वाले देश के बिडर से खरीद पर प्रतिबंध के संबंध में भारत के साथ भूमि सीमा साझा करने वाले देश का कोई भी बिडर इस निविदा में बिड देने के लिए तभी पात्र होगा जब वह बिड देने वाला सक्षम प्राधिकारी के पास पंजीकृत हो। बिड में भाग लेते समय बिडर को इसका अनुपालन करना होगा और कोई भी गलत घोषणा किए जाने व इसका अनुपालन न करने पर अनुबंध को तत्काल समाप्त करने और कानून के अनुसार आगे की कानूनी कार्रवाई का आधार होगा।

---Thank You/धन्यवाद---

**Expression of Interest
for**

“Empanelment of Agency for Implementing & Operating EPFO Contact Centre”

EMPLOYEES’ PROVIDENT FUND ORGANISATION

(Ministry of Labour & Employment)



Employees' Provident Fund Organization

Expression of Interest

EOI Reference Number: Ref: EPFO/CSD/Call-Centre/EOI

Dated: 12th July, 2024

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Section 1 – EOI Schedule and Address

S. No.	Particulars	Description
1	Name of Project	EOI for EPFO Contact Centre
2	Tender reference number	Ref: EPFO/CSD/callcentre/EOI Dated: 12.07.2024
3	Date of Publishing of EOI document on the website	12/07/2024 at 09:15 AM
4	Last date and time of receiving applicants' queries in writing	19/07/2024 at 05:45 PM
5	Last date and time for submission of EOI	02/08/2024 at 05:45 PM
6	Date and time of EOI Opening	05/08/2024 at 09:15 AM
7	Place of EOI submission & opening of EOI	Employees' Provident Fund Organization, 14 Bhavishya Nidhi Bhawan, Bhikaji Cama Place, Rama Krishna Puram, New Delhi, Delhi 110066
8	Name and address for communication	Sh. Rajesh Pandey Regional P.F. Commissioner-I 14 Bhavishya Nidhi Bhawan, Bhikaji Cama Place, Rama Krishna Puram, New Delhi, Delhi 110066 Phone: - 011-26160368 Email ID: rc.callcentre@epfindia.gov.in

Section 2 -Introduction

2.1 About Employees' Provident Fund Organization:

EPFO is one of the World's largest Social Security Organizations in terms of clientele and the volume of financial transactions undertaken. At present it maintains 27.74 crore accounts (Annual Report 2021-22) pertaining to its members.

The Employees' Provident Fund came into existence with the promulgation of the Employees' Provident Funds Ordinance on the 15th November 1951. It was replaced by the Employees' Provident Funds Act, 1952. The Employees' Provident Funds Bill was introduced in the Parliamentas Bill Number 15 of the year 1952 as a Bill to provide for the institution of provident funds for employees in factories and other establishments. The Act is now referred as the Employees' Provident Funds & Miscellaneous Provisions Act, 1952 which extends to the whole of India. The Act and Schemes framed thereunder are administered by a tri-partite Board known as the Central Board of Trustees, Employees' Provident Fund, consisting of representatives of Government (Both Central and State), Employers, and Employees.

The Central Board of Trustees administers a contributory provident fund, pension scheme and an insurance scheme for the workforce engaged in the organized sector in India. The Board is assisted by the Employees' PF Organization (EPFO), consisting of its head office at Delhi, 21 Zonal Offices, 139 Regional Offices and 113 District Offices across the country. The Organization has a well-equipped training set-up where officers and employees of the Organization as well as Representatives of the Employers and Employees attend sessions for training and seminars. The EPFO is under the administrative control of the Ministry of Labour and Employment, Government of India.

The Board administers three schemes - EPF Scheme, 1952, Pension Scheme, 1995 (EPS) and Insurance Scheme, 1976 (EDLI).

2.2 Project Background

2.2.1 The helpline was started with a toll-free number (1800118005) which was later on replaced with a short code (**14470**) to facilitate the redressal of queries and provide information and guidance related to EPFO services.

EPFO Helpline is operational from **7:00 AM to 9:00 PM** (on all days except gazette holidays) at locations across India viz. Zonal Offices of EPFO at Delhi, Chandigarh, Jaipur, Ahmedabad, Mumbai, Mangalore, Chennai, Hyderabad, Bhubaneswar, Kolkata and Guwahati responding to the queries in 12 languages. EPFO Call Centre has received **3,14,61,161** Calls in the calendar year 2023.

This project recognizes the need for a single window interface facilitating an Omni-channel grievance registration and redressal mechanism as well as for dissemination of information.

2.2.2 Currently, any stakeholder can call 14470 to seek information, advice or guidance for his/her queries. EPFO Helpline support the stakeholders by guiding them in the following

manner providing information related to but not limited to

- i. concerned District Offices, Regional Offices, Zonal Offices
- ii. Guiding and helping to enable the stakeholders to access the services of EPFO.
- iii. Educating the members about the schemes and provisions of EPFO
- iv. Empowering the stakeholders to use the available grievance registration and redressal mechanism.

2.2.3 Existing channels for receiving grievances of stakeholders

i. Inbound Channels- Helpline number, Landline phones of various offices, walk-in (PROs), Grievance registration portals, WhatsApp, Social Media (Facebook, Twitter, Instagram etc.

), physical Daks, ChatBot, UMANG, e-mails

ii. Outbound Channel- Letters, e-mails, Social Media (Facebook, Twitter, Instagram etc.),WhatsApp, ChatBot, SMS, Walk-in(PROs)

2.2.4 Any aggrieved person can register his/her grievance in the portal (EPFIGMS/EPGRAMS) and can upload the necessary documents if required.

i. EPFIGMS- EPFIGMS is a customized portal of EPFO to redress grievances for the services provided by EPFO. Grievances can be lodged at any place and will land in the concerned office to which the grievances pertain. Grievances can be sent to the Head office in New Delhi or the field offices (now 139) across the country. **16,50,583** grievances have been received on the EPFIGMS portal of EPFO in the calendar year 2023.

ii. CPGRAMS- Centralized Public Grievance Redress and Monitoring System (CPGRAMS) is an online platform available to the citizens 24x7 to lodge their grievances to the public authorities on any subject related to service delivery. It is a single portal connected to all the Ministries/Departments of Government of India and States. Every Ministry and States has role-based access to this system. CPGRAMS is also accessible to the citizens through a standalone mobile application downloadable through Google Play store and mobile application integrated with UMANG. **1,39,895** grievances have been received on the CPGRAMS portal in the calendar year 2023

2.2.5 Any aggrieved person can send an e-mail on the official e-mail IDs provided on the website and dedicated e-mail ID of CSD

- rc.cpgrams@epfindia.gov.in
- rc.epfigms@epfindia.gov.in
- rc.callcentre@epfindia.gov.in
- rc.csd@epfindia.gov.in

2.2.6 Any aggrieved person can send queries on the WhatsApp number of concerned Regional Offices which is available on the website.

*Employees' Provident Fund Organization**Expression of Interest*

2.2.7 Any aggrieved person can send queries/grievances on the social media handle of EPFO on Twitter and Facebook at **@socialpfo. 57466** grievances/queries have been received in 2023 through social media.

2.2.8 Missed Call Facility- Members registered on the UAN portal may get their details available with EPFO by giving a Missed call to **9966044425** from their registered Mobile number.

2.2.9 ChatBot – EPFO has rolled out ChatBot “**MAITREYI**” on the website to respond to the queries of employees, employers, pensioners, international workers and others.

Section 3 - Submission of Expression of Interest

- 3.1** The applicant shall fill in the Expression of Interest format as given in this EOI in Annexure 1 and 2. The applicant is required to provide the following information in addition to the filled EOI format:
- 3.1.1 Company profile
 - 3.1.2 Design and Solution architecture for the proposed project
 - a. Call routing technology & handling of call back generated by the system and calloverflow
 - b. Data centre requirement
 - c. Number and specifications of devices – Servers, Storage, Switches etc.
 - d. Minimum bandwidth required per agent (for recording and monitoring etc.) in case the solution is centralized
 - e. Service level in comparison to conventional Contact Centre target service and customer satisfaction level.
 - 3.1.3 Benefit to cost analysis of the various options available in call centre reference to staff level planning to meet call flow.
 - 3.1.4 Scope of work and Solution for the proposed project
 - 3.1.5 Any other information that would establish the credentials and suitability of the applicant in the context of the project
- 3.2** The applicant may also deliver a presentation on a date to be intimated in advance by EPFO, covering the above aspects.
- 3.3** Applicants will be shortlisted based on the information provided in the EOI and the above aspects.
- 3.4** EPFO reserves all rights to accept or reject any EOI without assigning any reason.
- 3.5** Empanelment of Agencies for implementation of EPFO Contact Centre at the Zonal/National level shall remain valid for a period of 5 years from the date of empanelment
- 3.6** Upon successful completion of the initial phase, EPFO can decide for the roll-out of the project in the remaining States and it shall be the discretion of EPFO to extend the empanelment of re-empanels the vendors for the same
- 3.7** Interested bidders are advised to study the EOI document carefully. Submission of EOI shall be deemed to have been done after careful study and examination of the EOI document with full understanding of its implications

*Employees' Provident Fund Organization**Expression of Interest*

- 3.8** Interested bidders may download the EoI document from the website <http://www.epfindia.gov.in>. EoI responses should reach the **RPFC-I,14 Bhavishya Nidhi Bhawan, Bhikaji Cama Place, R K Puram, New Delhi, Delhi 110066**
- 3.9** Empanelment of vendors does not guarantee work/business for the bidder
- 3.10** EPFO can stop the process of this empanelment without citing any reason
- 3.11** EoI document is not transferable

Section 4 – Scope of Work

4.1 EPFO is looking to transform the EPFO Helpline into an Integrated Grievance Management System with a new grievance registration software and intends to put necessary channels to govern, monitor & improve subscriber satisfaction by the way of redressal of grievances, automate processes across offices to resolve issues faster, improve service speed and quality by automating common requests from issue to resolution.

4.2 Broad Objective

4.2.1 To set up, 24*7 and 365 Days, operationalized and advanced multilingual Contact Centre with quality people, a robust system (which can replace EPFO's grievance registration portal (EPFiGMS) with a more advanced & sophisticated grievance system) to hear/understand the grievance across the multi-channel [Helpline number, Landline phones of various offices, walk-in (PROs), Grievance registration portals, WhatsApp, Social Media (Facebook, Twitter, Instagram etc.), physical Daks, ChatBot, UMANG, e-mails etc]], detailed documentation and to allow solving of the problem by bridging Head Office, Zonal Offices, Regional Offices together and pro-actively addressing stakeholders issues and keep the stakeholders informed all the time on real-time basis

4.2.2 To replace the EPFO's grievance registration portal EPFiGMS with a more advance and sophisticated grievance registration and resolution software.

4.2.3 Also enables stakeholders for more self-service through automation as well as providing service catalogue.

4.2.4 Enable EPFO by providing automated solution for auto-responses to e-mails, WhatsApp, Social Media, Chabot for common and general requests and queries.

4.2.5 Enable EPFO to use inbound/outbound calls as well as use our Omni-channel for responding back to the stakeholders, to get their feedback as well as for call back to attend the missed calls.

4.2.6 To disseminate information for education purposes.

4.2.7 The objectives of EPFO Contact Centre would be –

- i. To attend to the multilingual telephonic calls from the stakeholders and provide information to the caller and register their complaints in the more advanced grievance registration portal provided by the vendor.
- ii. To provide advice and guidance to the stakeholders.
- iii. To handle the complaints received through Omni-channels such as [Helplinenumber, Landline phones of various offices, walk-in (PROs), Grievance registration portals

(EPFIGMS & CPGRAMS), WhatsApp, Social Media (Facebook, Twitter, Instagram etc.), physical Daks, Chabot, UMANG, e-mails etc.]) and feed such information in the Customer Relationship Management(CRM) portal.

iv. To perform back-end operations to route the complaints to the concerned offices of EPFO through sophisticated routing rules.

v. To perform back-end operations for non-rule-based Omni-channels routing to the concerned officers and officials.

vi. To update the grievance handling software with the action taken on the complaint till their closure.

vii. To perform automatic rule-based escalation of the issue to concerned officers/officials/divisions.

viii. To perform Omni-channel engagement and support to stakeholders across Helpline numbers, Landline phones of various offices, walk-ins (PROs), Grievance registration portals, WhatsApp, Social Media (Facebook, Twitter, Instagram etc.), physical Daks, Chabot, UMANG, e-mails etc.)

ix. To call back on the missed calls numbers and provide necessary assistance.

x. To furnish reports as may be prescribed on disposal of grievance to Customer Service Division of Head Office.

xi. To call pensioners, customer and their family members who are in need with respect to claim and other services. **(Potential PF Mitra)**

xii. To place a dedicated 1+2 manpower at each Zonal Office Level for managing grievance redressal and support system.

xiii. To place a dedicated 1+2 manpower at Head Office for managing Grievance redressal Call Handling and support.

4.2.8 This section describes the broad scope of work that shall be carried out by the bidder who is selected in the RFP stage to implement EPFO Contact Centre.

4.3 Empanelment Procedure

4.3.1 Each bidder shall participate in the following stages to get empaneled:

- Stage I: Pre-Qualification
- Stage II: Proof of Concept

4.3.2 Each shortlisted bidder based on the pre-qualification criteria shall mandatorily participate in Proof of Concept (PoC) demonstration which forms an integral part of the EOI process.

4.4 Scope of Work Post Empanelment and Selection after RFP

The selected bidder (based on RFP evaluation at a later stage after EOI) shall procure, install, commission, operate and maintain the EPFO Contact Centre for a period of 5 years from the date of acceptance of Letter of Intent (LoI) / Work Order. An indicative scope of work to be undertaken by the selected bidder for setting up and operating EPFO Contact Centres is listed below:

- Design Phase

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- Supply, Installation, Integration and Commissioning Phase
- Operation and Maintenance phase

To implement EPFO Contact Centers at the National/Zonal level, the following sites need to be identified in terms of requirements, augmentation and establishment of the infrastructure (IT / Non-IT) by the Implementing Agency.

- **Data Centre:** Area used to co-locate the core IT components for EPFO Contact Centre like Application server, ACD, EPABX, CTI server, L2 switch, IVR, Call recording server etc.

- **Agent Area:** It refers to the area where the agents shall be located along with the machines for performing the operations and functions under EPFO Contact Centers. Agent Area shall have a capacity of a minimum of 300 agents scalable to 600 agents.

4.4.1. Design Phase

i. The broad scope of work during this phase will include the following, but is not limited to:

- Project Kickoff Meeting
- Preparation and submission of Comprehensive Project implementation plans and schedules separately
- Preparation and submission of the separate site readiness reports for the installation of all required equipment for the EPFO Contact Centre
- All paperwork and necessary formalities/ liaison with OEM on behalf of tendering authority
- Preparation and submission of separate Final Acceptance Test (FAT) Plans and schedules for EPFO Contact Centre
- Preparation and submission of any other policies/documentation/reports as demanded in the RFP along with required schedules
- Preparation and submission of manpower deployment plan and schedule with list of staff to be deployed under the project during different parts /stages of the project
- Preparation and submission of schedules of supply, installation, testing and commissioning of EPFO Contact Centre
- Multi-layer physical security infrastructure to prevent unauthorized access for EPFO Contact Centre
- Networking & Security Infrastructure and other associated IT Components for EPFO Contact Centre
- Adhere to routing and infrastructure policies of the data centre
- The selected agency shall be responsible for Physical Infrastructure comprising of Civil, Electrical, and Mechanical & Plumbing works required to establish EPFO Contact Centre

4.4.2. Supply, Installation, Testing and Commissioning Phase

- i. Tendering Authority shall provide the necessary minimum constructed space for locating the EPFO Contact Centre. Selected bidder shall arrange for necessary preliminary work which shall enable them to undertake civil, electrical, mechanical & plumbing works including false ceiling, partitioning, installation of electrical components, cable laying etc. at the EPFO Contact Centre site for the preparation of EPFO Contact Centre site as per the details that shall be given in the RFP
- ii. The selected bidder shall undertake all the necessary civil, electrical, mechanical & plumbing works including false ceiling/ flooring, partitioning, installation of electrical components, cable laying and other necessary services to create the Non-IT / Physical infrastructure
- iii. The selected bidder shall procure and install both IT and non-IT components, install and configure/ reconfigure (at no cost) / integrate every component and subsystem component, required for functioning of the EPFO Contact Centre.
- iv. The selected bidder shall be responsible for but not limited to supply and installation of the following:
 - All active and passive components
 - Physical infrastructure components such as UPS and Air-Conditioning Systems, Fire Detection and Control Systems, Diesel Generator Units, lighting system, Power, CCTV Surveillance systems and cabling etc.
 - IT Infrastructure components such as Servers, Databases, Networking & Security components, Storage, Software and other IT components etc. required at the Contact Centre
 - Commissioning & Acceptance Testing shall involve the completion of the Contact Centre site preparation, supply and installation of the required components and making the Contact Centre available to the EPFO for carrying out live Operations and getting the acceptance of the same from the tendering authority
 - Training on Contact Centre infrastructure
 - All documentation generated during the design, installation and commissioning phases shall mandatorily be made available to the tendering authority
 - Testing and Commissioning: Commissioning shall involve the completion of the following:
 - a. Contact Centre site preparation
 - b. Supply and installation of all the required IT and Non-IT components
 - c. Making the Contact Centre available to EPFO for carrying out live operations
 - d. Getting the acceptance of the same from the EPFO / Tendering Authority

4.4.3. Operations and Maintenance

- i. The selected bidder shall provide operating and maintaining services for a period of **5 years** from the date of commissioning of the EPFO Contact Centre. The scope of the services for overall Physical and IT infrastructure management shall include Monitoring, Maintenance and Management of the entire Contact Centre

ii. Managed Services

- Selected bidder shall set, operate & maintain the contact centre, including agents, at State-owned / rented premises with well trained & empowered staff to handle queries/complaints of the customers and provide solutions to their utmost satisfaction
- Number of agents, equipment & infrastructure required for managing the traffic of queries arriving at the contact Centre shall be enhanced periodically or as per the requirement which will have to be approved by the identified competent authority to meet the growth in traffic of queries/grievances from different stakeholders of EPFO Contact Centre.

iii. Channels Supported – Inbound and Outbound

- Scope of services includes handling all types of inbound queries for informational and complaint Services and also reaching out to citizens through outbound calls, SMS, Emails, Letters and Fax to respond to queries/grievances of stakeholders not resolved earlier or for pro-actively obtaining feedback on services delivered by the Contact Centre

iv. Window of Operations

- The support window required for EPFO Contact Centre shall be for 16 hours a day (6 a.m. – 10 p.m.), on all days of the week throughout the year excluding Gazetted Holidays. This may scale up to a 24x7 support at a future date depending on volume and /or other parameters

v. Content Management

- EPFO Contact Centre will provide informational and grievance registration/resolution services to citizens based on the content contributed by EPFO. Thus the selected bidder shall be responsible for the following:
 - a. Creation of content (based on data/information provided by EPFO) in the prescribed format both for internal purposes and for services delivered through EPFO Contact Centre.
 - b. Managing the flow of content between EPFO Offices and EPFO Contact Centre
 - c. Modifying and updating content
 - d. Preparing and maintaining FAQs and citizen database

vii. Recruitment and Training

The requirement of the EOI is related to providing Contact Centre manpower, a Customer Service Relationship Management System, and IT infrastructure set-up. The selected bidder shall be responsible for recruiting all the executives, staff and agents for the EPFO Contact Centre who can be used as and when required for the

below mentioned activities but not limited to –

- Presentations for department review
- Online complaints Registration
- Handling the Open Complaints
- Root Cause Analysis of Key Issues assigned by the department
- Manual reports preparation in Excel

Also, appropriate training shall be conducted to enable them to provide services through EPFO Contact Centers.

viii. Grievance Redressal Portal

- a. Advance grievance registration portal which can replace EPFiGMS.
- b. Monitor as well as identify the issue of the grievance to fix it proactively and enable stakeholders for more self-service through automation.
- c. Initiate automated solutions for common/general queries with service catalogue.
- d. The system must be capable of supporting the commitment of EPFO in respect of the citizen charter as well as prescribing a timeline as mentioned in the Act/Schemes.
- e. Must provide a Kanban-style board for managing Omni-channel grievances/tasks at the field offices/ officers and official level of EPFO.

ix. IT Infrastructure set up

The vendor will be responsible for the creation of well-furnished space providing hardware, software, manpower, maintenance, management, and development of web-based packages and web-enabling databases.

viii. Apart from the above-mentioned points, following is a list of indicative scope of work for the Operations & Maintenance phase:

- a. System administration, maintenance and management services
- b. Network management services
- c. Server and storage administration and management services
- d. Security administration and management services
- e. Knowledge management
- f. Performance management

Section 5 – Eligibility Criteria**5.1 Pre-requisite:**

The applicant should possess the requisite experience, resources and capabilities to provide the services necessary to meet the requirements, as described in the tender document. The Applicant should also possess the technical know-how and the financial wherewithal that would be required to complete the scope of work. The EOI must be complete and shall be submitted as per **Annexure 1 & 2**. Applicants not meeting the Eligibility criteria will not be considered for evaluation of EOI.

5.2 Eligibility Criteria:

The invitation to EOI is open to all Applicants, who qualify for the following Eligibility Criteria:

Prequalification criteria for bidders		
Parameter	Requirement Description	Supporting documents
Blacklisted	The company should not be currently blacklisted by any Govt. Department/bank/institution in India or abroad	Self-declaration by the authorized signatory of the Bidder.
Existence	Company should have been in existence in the last 5 years	Certificate of incorporation
Full Cycle Implementation Experience as Primary Contractor	The Bidder must have full cycle implementation experience of the proposed call centre product in at least two organizations in the last five years (period ending Bid submission date)	
Government Customers (PSU / Central / State) experience in India as Primary Contractor	<ul style="list-style-type: none"> The bidder must have implemented/being implementing a Contact centre solution in at least two Government Customer (PSU / Central / State/PSB) in India in last five years (period ending up to Bid submission date) The company's Highest Value of single Purchase Order executed in Last three Years should be equal to or more than Rs. 50 crore. The company should have executed a minimum of 2 projects, above Rs. 50 Crore in the last three years. The company should have implemented at least two call centre project of 500 seats each in the last three years from the date of EOI. The call centre must have been in operational stage as of now. 	Project completion certificate from Customers of thereferred projects

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Local Presence	<ul style="list-style-type: none"> The Bidder should have an office in Delhi The project will be operated at multiple locations and it is preferred that the company should have presence in all the metros and the ability to support the local language in addition to English and Hindi 	Shops & Establishment Certificate from Appropriate Authority
Net-profit organization	<ul style="list-style-type: none"> Bidder should be a net profit-making organization in each of the last three financial years as of bid submission date 	<p>Audited Balance sheets for the last 3 years i.e 2021-22, 2022-23 & 2023-24 where profit or loss from similar works is segregated. Every sheet should be duly certified by a chartered accountant or accounting firm stating Net worth, turnover and profit/loss for last 3 financial years.</p> <p>OR</p> <p>A letter under the head of the chartered accountant/ or firm certifying the profit and loss of the company from a similar line of service is to be submitted with the bid</p>
OEM vendor authorization	In case the company is not an OEM	Authorization certificate/ letter of Product from the Product Vendor
Financial stability of the bidder	The average net worth of the bidder must be more than INR 50 Crores during the last two Financial years- 2021-2022 & 2022-23	Documentary evidence in form of certificate from CA in practice

Note:

- In case of consortium bidding, the Lead member (partner) shall qualify all the criteria solely.*
- Upgrade projects will not be considered as implementation experience of the Bidder*
- In case of completion certificate not being available, copies of client e-mails from the authorized representative of the client organization confirming completion of the project, are allowed after the same is certified by Company Secretary. Go-live certificate issued by the authorized representative of the client organization where completion certificate is not available*
- Bidder undergoing assessment for not more than one year (after expiry of its earlier certificate) can submit a certificate for ongoing assessment issued by the assessment agency*

Section 6 – Information and Instructions to the Bidders**6.1 Important Information**

- 1. Name of the Client:** Employees Provident Fund Organization, Ministry of Labour & Employment, Government of India
- 2. Name of the assignment:** “Empanelment of Agencies for Implementing and Operating EPFO Contact Centre”
- 3. Method of empanelment:** Pre-qualification criteria and Demonstration of Proof of Concept (PoC)
- 4. Validity Period of the Proposals:** The proposal must remain valid for one eighty (180)days from the date of submission
- 5. Period of Empanelment:** The empanelment shall be valid for an initial period of 5 years which may be extended on mutually agreed terms
- 6. Date of pre-bid meeting: July 22,2024, at 15:00 hrs.** in Conference Room, 3rd Floor, 14 Bhavishya Nidhi Bhawan, Bhikaji Cama Place, Rama Krishna Puram, New Delhi, Delhi 110066

The last date for submission of written queries for clarifications is **July 19, 2024**. Queries can be submitted through email or submitted in hard copy at the following address:

Sh. Rajesh Pandey, RPFC-I
 14 Bhavishya Nidhi Bhawan,
 Bhikaji Cama Place, R K
 Puram,New Delhi, Delhi
 110066 Phone: - 011-
 26160368
 Email ID: rc.callcentre@epfindia.gov.in

- 7. Last Date for submission of bids: 17:45 hrs. on August 02, 2024.** The proposal submissionaddress is:

Sh. Rajesh Pandey, RPFC-I
 14 Bhavishya Nidhi Bhawan,
 Bhikaji Cama Place, R K
 Puram,New Delhi, Delhi
 110066 Phone: - 011-
 26160368
 Email ID: rc.callcentre@epfindia.gov.in

Proposals received after the stated time and date would not be considered and would be returned unopened

- 8. Opening of Prequalification Bids:** The date of opening of pre-qualification shall be informed to the bidders during the pre-bid meeting
- 9. Presentation on a technical bid by short-listed bidders, if required**

10. Process for Empanelment: Empanelment of agencies for EPFO Contact Centre shall follow the following process:

- i. Pre-Qualification – All agencies responding to this tender would need to meet the pre-qualification criteria to get qualified
- ii. Demonstration of Proof of Concept (PoC) – Agencies meeting the Prequalification criteria would be required to demonstrate a PoC as per the criteria of this EoI which describes the test cases for PoC evaluation.
PoC is a mandatory activity for the qualified agencies to participate
- iii. Technical evaluation committee appointed by EPFO shall evaluate the PoC demonstration by participating bidders based on the test cases
- iv. Only those bidders who successfully demonstrate a minimum of 10 test cases shall be empaneled. It is important to note that the decision of the Technical Committee / EPFO shall be final in this case

11. Others:

- i. Bidders are advised that the empanelment of agencies for Implementation of the EPFO Contact Centre shall be based on the Process for Empanelment specified in this EoI. The bidders shall be deemed to have understood and agreed that no explanation or justification for any aspect of the Process for Empanelment shall be given and that the decisions of EPFO in this regard are without any right of appeal whatsoever
- ii. Material deficiencies in providing the information requested may result in the rejection of the proposal. EPFO's decision in this regard shall be final and binding
- iii. The cost to be incurred by the prospective bidders to prepare the proposals and for negotiating the contract, including any visits to EPFO Head Office or Zonal Offices will not be reimbursed
- iv. Information relating to the evaluation of proposals and recommendations concerning the award shall not be disclosed to the bidders or other persons not officially concerned with the process
- v. During the evaluation of the proposals, EPFO may, at its discretion, ask the bidders for clarifications on their proposal. The bidders are required to respond within the time frame prescribed by EPFO
- vi. At any time prior to deadline for submission of proposal, EPFO may for any reason, modify the EoI. The prospective bidders having received the EoI shall be notified of the amendments through website and such amendments shall be binding on them
- vii. **Right to reject any or all proposals:** Notwithstanding anything contained in this EoI, EPFO reserves the right to accept or reject any proposal, at any time without any liability or any obligation for such acceptance, rejection or annulment, and without assigning any reasons thereof
- viii. Without prejudice to the generality of Clause (vii) above, EPFO reserves the right to reject any Proposal if:
 - (a) At any time, a material misrepresentation is made or discovered, or
 - (b) The Bidder does not provide, within the time specified by the EPFO, the supplemental information sought by the EPFO for evaluation of the proposal.

Misrepresentation / improper response by the Bidder may lead to the disqualification of the Bidder

6.2. Instruction to Bidder for Submission of Proposals

The instructions for submitting the EoI are mentioned below:

- 6.2.1.** Based on the empanelment done through this EoI, empaneled bidders shall be willing to implement and operate in any of the States
- 6.2.2.** EoI and all associated correspondence shall be written in English and conform to prescribed formats. Any interlineations, erasures or over writings shall be valid only if they are initiated by the authorized person signing the EoI
- 6.2.3.** EoI received by Email shall be treated as defective, invalid and rejected. Only detailed complete EoI in a physical format and properly sealed envelopes, as mentioned below, received before closing time and date of the proposals shall be taken as valid
- 6.2.4.** The bids shall be submitted in a single sealed envelope and superscripted ***“Prequalification Proposal: Empanelment of Agency for Implementing and Operating EPFO Contact Centre”***. This envelope should contain two hard copies of the Pre-qualification proposal marked as “First Copy” and “Second Copy” and one soft copy in the form of a non-rewriteable CD. CD media must be duly signed using a Permanent pen Marker and should bear the name of the bidder submitting the bid
 - a. Bids shall consist of the required supporting proofs and documents as defined in the pre-qualification section
 - b. Bidder shall submit all the required documents as mentioned in the annexure. It should be ensured that various formats mentioned in this EoI should be adhered to and no changes in the format should be done
- 6.2.5.** Envelope should indicate clearly the name, address, telephone number, Email ID and fax number of the bidder
- 6.2.6.** Each copy of the tender should be a complete document and should be bound as a volume. The document should be page numbered and appropriately flagged and must contain the list of contents with page numbers. Different copies must be bound separately. Any deficiency in the documentation may result in the rejection of the Bid
- 6.2.7.** Bidder must ensure that the information furnished by him / her in respective CDs is identical to that submitted by him in the original paper bid document. In case of any discrepancy observed by the EPFO in the contents of the CDs and original paper bid documents, the information furnished on original paper bid document will prevail over the soft copy
- 6.2.8.** EoI document submitted by the bidder should be concise and contain only relevant information as required under this EoI
- 6.2.9.** The bidder would be responsible for all of its expenses, costs and risks incurred

towards preparation of the Eol document, attending any pre-bid meeting and visiting the site or any other location in connection therewith. EPFO shall, in no case, be responsible or liable for any such costs whatsoever, regardless of the outcome of the Eol process

6.3. Clarification of Bid Document

6.3.1. A prospective Bidder requiring any clarification of the Bid Document may submit his / her queries to the Purchaser in writing at the Purchaser's mailing address. The last day for submission of query is July 19, 2024

6.3.2. Written copies of the Purchaser's response (including an explanation of the query but without identifying the source of inquiry) shall be sent to all prospective Bidders who have either purchased the Bid Document from EPFO Contact Centre or have sought clarification(s)

6.3.3. The queries must be submitted in the following format:

S.No.	Section No.	Clause No.	References / Subject	Clarification

6.3.4. Amendment of Bid Document

i. At any time before the last date for receipt of Bids, the Tendering Authority, may, for any reason, whether at its initiative or in response to a clarification requested by a prospective Bidder, modify the Bid Document by an amendment

ii. Any modifications that may become necessary due to the pre-bid queries shall be made by the tendering authority exclusively through the issue of an Addendum / Corrigendum on the website <http://www.epfindia.gov.in>. The Tendering Authority shall be free to amend the documents as per requirements.

The notice of change, if any, will be made available on the website as well as communicated through email to all bidders whose email addresses must be made available to the Tendering Authority. No other communication will be made in this regard

iii. To provide prospective Bidders reasonable time in which to take the amendment into account in preparing their Bids, the Purchaser may, at its discretion, extend the last date for the receipt of Bids

iv. Purchaser may at any time during the bidding process request the Bidder to submit revised Technical / Commercial Bids and/or Supplementary Commercial Bids without thereby incurring any liability to the affected Bidder or Bidders

Section 7 – Disclaimer

EPFO is not committed either contractually or in any other way to the applicants whose applications are accepted. The issue of this Request for EOI does not commit or otherwise oblige EPFO to proceed with any part or steps of the process. Subject to any law to the contrary, and the maximum extent permitted by law, EPFO and its directors/officers/employees/contractors/agents and advisors disclaim all liabilities (including liability because of negligence) from any loss or damage, cost or expense incurred or arising by reasons of any person using the information and whether caused by reasons of any error, omission or misrepresentation in the information contained in this document or suffered by any person acting or refraining from acting because of any information contained in this Request for EOI document or conduct ancillary to it whether or not the loss or damage arises in connection with any omission, default, lack of care or misrepresentation on the part of EPFO or any of its officers, employees, contractors, agents or advisors.

Section 8 – Proof of Concept (Partial and Indicative)

8.1. Each shortlisted bidder, based on the Pre-qualification criteria shall have to mandatorily participate in the Proof of Concept (PoC) demonstration. PoC demonstration shall be examined by the Technical Evaluation Committee, appointed by EPFO. It is important to note that the decision of EPFO shall be final and binding in this regard to all the participating bidders.

Every shortlisted bidder shall submit a detailed approach & methodology and work plan/implementation plan for the following points:

Approach & methodology

- i. Understanding of scope
- ii. Proposed Solution (end-to-end solution design)
 - System architecture
 - Redundancy & scalability
 - Security
 - Technical features offered beyond requirements
 - Content Management
 - Disaster management & Data recovery
- iii. Quality Framework
 - SLA
 - Methodology & proposed quality plan
 - Performance management
- iv. Implementation Plan
- v. Proposed business model
- vi. Risk & challenges
- vii. Value addition from bidder

8.2. Proposal Presentations - The shortlisted bidders based on the pre-qualification criteria shall be invited to make a presentation to EPFO on a date, time and location notified by the EPFO. The purpose of such presentations would be to allow the bidders to present their technical solution, approach & methodology & quality of the professionals proposed to the committee and other key points in their proposals

8.3 EPFO may require verbal / written clarifications from the bidders to clarify ambiguities and uncertainties arising out of the evaluation of the bid documents and PoC demonstration phase. Verbal clarifications provide the opportunity for EPFO to state its requirements clearly and for the bidder to more clearly state its proposal. EPFO may seek inputs from their professional, technical faculties in the evaluation process and even during the PoC phase

8.4. EPFO reserves the right to decide on the number of agencies to be empaneled. Decision of EPFO in this regard shall be final & binding and no further discussion / interface shall be held with the bidders whose bids are disqualified / rejected based on

pre-qualification criteria or based on the PoC demonstration results

8.5 Indicative Process Flow for EPFO Contact Centre

The indicative process flow for the contact centre has been explained below to provide the bidder with an overview of the envisaged process. Bidders are allowed to propose any alternate process which may be appropriate for the contact centre

8.5.1 The citizen calls on the single unique number-**14470** for the contact centre which would be common across the country

8.5.2 Call lands at the PSTN network

8.5.3 PSTN network patches this call to the Base contact centre. Here base contact centre is referred to the zones where the caller is currently located

8.5.4 At this stage the IVR asks for language selection - Press 1 for Hindi, 2 for English or 3 for Regional Language (Voice response for language options shall be in respective language)

8.5.5 The call is then transferred to an agent. Firstly, it will be ascertained if the call is for the Base contact centre or any other call centre. If the call is for another call centre, it will be routed to the respective call centre

8.5.6 If the call is for the Base contact centre, the following procedure is adopted while call handling.

- Firstly, it will be checked if the citizen is a registered user. If the citizen is not registered under this contact centre, some basic information would be asked from the citizen (like name, phone number, etc.) and will be stored in the CRM which will be used for further identification
- As a next step, the type of service required will be ascertained by contact centre agent
 - Informational Service or
 - Grievance Service

Case 1: Call is for Informational service

8.5.7 The agent will fetch the information from the EPFO portal, CRM server and available databases and provide the same to the citizen. This will be the L0 level of call handling

8.5.8 If the citizen requires more information, the call will be transferred to the domain expert of the EPFO Contact Centre who will be the L1 level of call handling

8.5.9 In case, citizen requires more information which is not available even with the L1 level, call will be routed to the level L2 which shall be the identified Departmental officer. This officer shall provide the required information to the citizen

Case 2: Call us for Grievance Registration

8.5.10 If the service required by the citizen is a complaint, the agent will register the grievance on the new CRM portal (New Grievance Registration portal)

8.5.11 After the call ends, the database for the citizen will be updated and based on the requirement an SMS or Email will be send to the citizen regarding the closing of the call

8.5.12 Based on the parameter defined in the Recording server, the server will fetch the conversation between the citizen and the agent and store that in the SAN for internal training and quality purposes

8.6 Proof of Concept (PoC)

8.6.1 Proof of concept for this Eol is defined as a demonstration of capabilities for setting up and operating a contact centre to prove the idea and feasibility of the EPFO Contact Centre as envisioned by the Government of India. The demonstration could be done using a part of an existing call centre and should provide a representative solution through a relatively small number of users acting in business roles to satisfy various aspects of the requirements

8.6.2 A detailed list of test cases has been provided in section 6.8.6. EPFO and its authorized representatives shall witness the PoC results

8.6.3 Each shortlisted bidder based on the pre-qualification criteria shall demonstrate the PoC using a combination of a presentation and a floor visit. It could be a 3-5 seater existing call Centre, for a Government / PSU / NGO process at a location convenient to the bidder (in near State Capitals) or as proposed by EPFO. The Service Provider is expected to bear the cost of demonstrating the PoC and would also be responsible for making the test calls

8.6.4 PoC shall be demonstrated in English and Hindi and at least one local language of any / all of the 21 Zonal Offices

8.6.5 The following list of Informational and Grievance services shall be demonstrated for PoC:

i. Informational

- Information on How to know UAN
- Contact details of Department Officials
- Information on How to file a withdrawal form

ii. Grievance

- Application for Grievance
- Application for RTI
- Application for withdrawal/ certificate of coverage for International Workers
- Status Update for each of the above services

8.6.6 Proof of Concept should include the five key aspects of successful operations:

- 1) Customer Orientation,
- 2) Process Efficiency
- 3) Language process capabilities.
- 4) People and Learning and
- 5) Dependencies related to cross-process support and off-site data

8.6.7 Each bidder shall demonstrate the process flow as mentioned in section 6.7. for PoC demonstration which shall be assessed based on the following Test Cases:**Test 1: Call Setup**

- a. Call Identification (for Personalized Service Delivery)
- b. Recognize call type – Landline or Mobile
- c. Recognize the Originating Location of the caller
- d. Routing to Call Centre
- e. Recognize whether the call is for other state/utility call centres – EPABX Level Filtration
- f. Route Calls to other states / Zonal Call Centre

Test 2: Call Handling

- a. Automatic Call Distribution (ACD) Demonstration
- b. Multilingual support
- c. Play advertisement in place of a normal ring tone
- d. Multi-channel integration including voice, email, letter, fax, SMS, etc.

Test 3: Data Handling

- a. Record Call
- b. Integration of IVR and Agent Desktop (CTI)
- c. Demonstrate ability to fetch data from Grievance Portal and CRM Server.
- d. Initiate Call back (Allows the agent to re-establish contact with a caller)
- e. Ability to send and receive voice, video, text (Instant Messaging [IM], SMS), and data
- f. Multi-Channel support

Test 4: After Call Work

- a. Update data in Storage Area Network
- b. Integration with SMS Gateway for inbound and outbound SMS services to the

citizen including push and pull modes. Example – messaging the complaint number and fetching the status update from the contact centre application server

Test 5: Processes and Procedures

- a. Data Source Validation
- b. Script Changes – Add, Modify, Delete etc.
- c. Cross process linking
- d. Knowledge Management - Caller profile generation and updating

Test 6: Disaster Management and Recovery Procedures

- a. Disaster Management Process
- b. Recovery Process and Time

Test 7: Speech Recognition Capability

- a. Speech Recognition
- b. Call Transfer based on speech recognition

Test 8: Dashboards for measuring Metrics

- a. First call resolution
- b. Service Level
- c. Average handling time
- d. Average talk time
- e. Report on Call life cycle for every call
- f. Creation of online real-time MIS reporting system with remote login capability for EPFO Omni-channel support.

Test Case 9: Remote Agent Area

- a. Demonstration of the capability to provide contact centre services with agents seated at a remote location (s), not co-located with the Contact Centre, including remote management for data, application and access control
- b. Identification of minimum bandwidth requirement for providing contact centre services through remote management.

Test case 10: Ability to process Omni-channel grievances and request and report thereof.

Test Case 10a: Creation of new application/workflow for identified Departments

- a. Demonstration of the capability for developing new applications/workflow for issues which do not have existing applications
- b. Solution to be developed should support virtualization and multi-tenant deployment
- c. Application instance for every issue should demonstrate the technical ability to self-administer each of the following (indicative) functions
 - Inbound ACD – create and modify properties for agents and queues
 - Computer Telephony Integration(CTI)– customize existing integrations; build new

ones, integration with the state-common application / office-wise applications

- IVR – design own IVR call flows. Integrate with external applications, etc.
- Outbound Dialing – manage lists, configure rules
- Live web chat/collaboration – database of responses to FAQs
- E-mail Management System – database of responses to FAQs
- Multimedia call recording – start/stop recording. Access recording database
- Reporting – create custom reports. Store database at tenant's site
- Document / Content management
- Forms / Workflows / Business Rules – Creation and Change Management

d. Single sign-on for all applications

e. Handling of multiple sessions for a given client

f. Creating and implementing cross-application workflows without the need to log in multiple applications and data entry in multiple applications

g. Ability to integrate multiple applications or onboard new applications as and when they are introduced

h. Knowledge base

Test Case 10b: Technology Integration

Demonstration of a framework for end-to-end integration for existing (and upcoming) applications/systems and present them in a unified manner to both call centre agents and at customer service centres using the following:

- Front-end integration / Screen level integration
- Web service integration
- Staging area database access
- Automation tool-kit to perform configuration-based quick hosting and automation of various types of applications web, java, windows, mainframe, emulators, etc.

8.6.8 Please note that this is an indicative process flow only and bidders can demonstrate value-added features and functionalities as part of their solution

Section 9 – Terms and Conditions for Empanelment Contract

9.1. General Conditions

9.1.1. Participation in RFP

All the empaneled vendors must participate in every National/ Zonal Contact Centre implementation defined in this EoI. However, EPFO reserves the right to alter/change this condition and the decision of EPFO in this case shall be final.

9.1.2. Validity of Bid

The bid submitted by the bidders shall remain valid for a period of 180 (one hundred and eighty) days after the date of bid opening. Any bid valid for a shorter period shall be treated and rejected as non-responsive. EPFO may solicit the bidder's consent to an extension of bid validity beyond the mentioned period but without modification in the proposal.

9.1.3. Clarifications to EoI

During EoI evaluation, EPFO may, at its discretion, ask bidders for clarifications on their EoI. The bidders are required to respond within the time frame prescribed by EPFO during the release of clarifications.

9.1.4. Amendments in EoI

At any time before the deadline for submission of the EoI, EPFO may for any reason, modify the EoI. The prospective bidders having received the EoI shall be notified of the amendments through the website and such amendments shall be binding on them.

9.1.5. Disqualification

EPFO may at its sole discretion and at any time during the evaluation of EoI, disqualify any bidder if the bidder has:

- i. Submitted the EoI documents after the response deadline
- ii. Made misleading or false representations in the forms, statements and attachments submitted in proof of the pre-qualification requirements
- iii. Exhibited a record of poor performance such as abandoning works, not properly completing the contractual obligations, inordinately delaying completion or financial failures, etc. in any project in the preceding three years
- iv. Submitted an EoI that is not accompanied by required documentation or is non-responsive
- v. Failed to provide clarifications related thereto, when sought
- vi. Submitted more than one EoI
- vii. Declared ineligible by the Government of India / State / UT for corrupt and fraudulent practices or blacklisted

9.1.6. Confidentiality

Information relating to the examination, clarifications and comparison of the EoI shall not be disclosed to any bidders or any other persons not officially concerned with such process until the empanelment process is over. The undue use by any bidder of confidential information related to the process may result in rejection of its EoI.

9.1.7. Force Majeure

No failure or delay or omission by either party to fulfil any of its obligations under empanelment contract (other than the obligations to make payments when due) shall give rise to any claim against such party or be declared to be a breach of any terms and conditions defined in the empanelment contract if any to the extent such failure, delay or omission arises from the "Force Majeure" event not within the reasonable control and at the instance of such Party (each an event of "Force Majeure"). Events of force Majeure shall be:

- i. Blockade, Revolution, Riot, Bombs, Religious strife or civil commotion;
- ii. Strikes, lock-outs or other industrial action (other than those involving primarily Service Provider's own employees or any of the contractors, subcontractors, etc. directly associated with the provision of Services under this EoI);
- iii. Act of war (whether declared or undeclared), terrorist or military action, politically motivated sabotage;
- iv. A decision or the order of a court or tribunal, which has the effect of restraining or delaying the provision of Services;
- v. Explosions, accident, breakage of facilities, plant or equipment, structural collapse, fire chemical or radioactive contamination (other than resulting from an act of war, terrorism or sabotage), caused by a person not being the affected Party or one of its contractors or sub-contractors, sub-lessees or any other agencies of the affected Party or any of their respective employees, and not being due to inherent defects of the affected facility or the failure to properly operate the affected facility;
- vi. Fire, lightning, earthquake, cyclone, hurricane, whirlwind, flood, landslide or any such natural disaster;
- vii. Epidemic or plague;
- viii. Any event or circumstance of the nature analogous to any of the above or any natural disaster

9.2. Non Waiver

Waiver of any breach of the provision of, or any default under the empanelment contract must be in writing and signed by the Party granting the waiver. No failure or delay on the part of either Party in exercising or any omission to exercise any right or remedy accruing to either Party under the empanelment contract shall be a waiver thereof, nor will any partial exercise of any right or remedy particular be a waiver of further exercise of that right or remedy.

9.3. Amendment

Terms and conditions as defined in the empanelment contract shall not be modified, added to or amended in any manner except by mutual agreements in writing of the Parties. All modifications, additions or amendments under the empanelment contract must be in writing and signed by an authorized representative of the Parties hereto to be effective and enforceable between the Parties.

9.4. Arbitration

9.4.1. All disputes, differences, claims and demands arising under the empanelment contract shall be referred to arbitration of a sole arbitrator to be appointed by the mutual consent. All arbitration shall be held in New Delhi

9.4.2. If the parties cannot agree on the appointment of the Arbitrator within one month from the notification by one party to the other of the existence of such dispute, then the Arbitrator shall be nominated by the EPFO. The provisions of the Arbitration and Conciliation Act, 1996 shall be applicable and the award made there under shall be final and binding upon the parties hereto, subject to legal remedies available under the law. Such differences shall be deemed to be a submission to arbitration under the Indian Arbitration and Conciliation Act, 1996, or of any modifications, Rules or re-enactments thereof

9.5. Governing Laws

9.5.1. Empanelment contract shall be covered and construed in accordance with the Laws of India including without limitation, the relevant Central and State Acts and Rules, Regulations and Notifications issued and amended thereunder from time to time

9.5.2. Courts in New Delhi shall have the jurisdiction in case of litigation between the parties

9.6. Third Party Claims

Bidder (the "Indemnifying Party") undertakes to indemnify the client (the "Indemnified Party") from and against all losses, claims for damages including losses, claims for damages on account of bodily injury, death or damage to tangible

9.7. Limitation of Liability

There shall be no limitation of liability in case of any damages for bodily injury (including death) and damage to real property and tangible personal property as also intangible personal property and intellectual property rights

Employees' Provident Fund Organization

Expression of Interest

Section 10 – Participation in Technical and Financial Bid

Applicants shortlisted upon evaluation of the submitted EOIs shall be eligible for the submission of technical and financial bids. Detailed RFP shall be made available to shortlisted applicants.

Annexure: 1 Information Pertaining to Applicant

Sl.No	General Data of Interested Company		Response
1	Name of the Company	:	
2	Address of the Regd./Corp office	:	
3	Address of the works/Mfg. Unit/Plant	(a)	
	<i>(If more than three please attach separate sheet)</i>		
4	Type of the Company	:	Proprietary/Private Ltd./Public Ltd./Partnership/LPP etc.
5	Name of the Contact Person	:	
6	Designation of the Contact Person	:	
7	Contact Detail	:	
	Land Line	:	
	Mobile	:	
	Fax	:	
	E-Mail	:	
8	Date of Incorporation/Establishment	:	
9	Nos. of Permanent Employees	:	
10	Nos. of Contractual Employees	:	

*Employees' Provident Fund Organization**Expression of Interest***DETAILS OF INCOME TAX & ST CLEARANCE**

Sl.No.	Particulars		Remarks
2.1	Income Tax	Permanent A/c No.:	
2.2	Service Tax	Registration No. :	

Note: Please attach copy of registrations.

DETAILS OF RELEVANT CERTIFICATION

The following certification is required –

- ISO 2001
- ISO 27001
- CMM Level and above
- Any other certification may be detailed

Note: Attach documentary evidence

PRODUCT & PRODUCT SUPPORT

a. The vendor is authorized to market to E P F O in case an off the shelf third party software is being offered

Yes

No

(Pl. enclose authorization)

b. Availability of key project personnel with experience of similar project to be deployed in this project

Yes

No

Comments (if any):

c. The off the shelf product if offered is audited & certified for security by third party auditor.

Yes

No

Comments (if any):

d. Do you have competency in giving end-to-end solution?

Yes

No

Give details:

*Employees' Provident Fund Organization**Expression of Interest***LIST OF CLIENTS**

Sl.No	Name of client	Location	Copy of work order enclosed (Y/N)	Modules	Remarks
1					
2					
3					
4					
5					

SITES WHERE CALL CENTRE IS BEING DEVELOPED / CUSTOMIZED/IMPLEMENTED

Sl. No.	Name of the organization, Contact person, designation	Address and phone no	Modules	Status (underdevelopment / implementation / customization)
1.				
2				

LIST OF BRANCH OFFICE

Please enclose list of Branches in India in the under noted format.

<i>Sl.No</i>	<i>Name of City</i>	<i>Remarks</i>

MANPOWER STRENGTH DETAILS OF THE BIDDER

Technical personnel	Location	Direct	Outsourced
Managerial			
Technical - Development			
Technical - SUPPORT			
Others (Pl. specify)			

*Employees' Provident Fund Organization**Expression of Interest***FINANCIAL DETAILS OF THE BIDDER (Rs/Lakhs)**

Attach Balance Sheet for last three audited financial years. The company should have positive turnover in the last three years.

Sl. No.		Please mention Year		
1.	Turnover			
2.	Profit before Tax			

OTHER INFORMATION

a. Is the company a sick / potentially sick company?

Yes No

b. Does the company have business with any other unit(s) of EPFO?

Yes No (If yes, attach details).

*Employees' Provident Fund Organization**Expression of Interest*

Annexure 2: Declaration regarding Clean Track by Applicant
(On Applicant's Letterhead)

To

Sh. Rajesh Pandey
Regional P.F. Commissioner-I
14 Bhavishya Nidhi Bhawan, Bhikaji Cama Place,
Rama Krishna Puram, New Delhi, Delhi 110066

Dear Sir,

EOI: Ref:**Dated**

I have carefully gone through the Terms and Conditions contained in the above referred EOI. I hereby declare that my company/firm is not currently debarred/black listed by any Government / Semi Government organizations/ Institutions in India or abroad. I further certify that I am competent and authorized officer in my company/firm to make this declaration.

Or

I declare the following

S. No.	Country in which the company is debarred/ blacklisted/ case is pending	Black listed/debarred by Government /Semi Government Organization/ Institutions	Reason	Since when and for how long

(NOTE: In case the company/firm was blacklisted previously, please provide the details regarding Period for which the company/firm was blacklisted and the reason/s for the same)

Yours faithfully,

(Signature of the Applicant)

Printed Name

Designation

Seal

Date:

Official Address:

Sh. Rajesh Pandey, RPFC-I
14 Bhavishya Nidhi Bhawan,
Bhikaji Cama Place, RK Puram,
New Delhi, Delhi 110066
Phone: - 011-26160368
Email rc.callcentre@epfindia.gov.in

Employees' Provident Fund Organization

Expression of Interest