



Request for Quotation for Subscription to Microsoft Office 365 Cloud Services on a Software-as-a-Service (SaaS) Model



Indian Institute of Banking & Finance
Corporate Office
Kohinoor City, Commercial II, Tower I,
2nd Floor, Kiroli Road,
Kurla - West
Mumbai – 400 070.

REQUEST FOR QUOTATION

FOR SUBSCRIPTION TO MICROSOFT OFFICE 365 CLOUD SERVICES ON A SOFTWARE-AS-A-SERVICE (SAAS) MODEL

(No:- RFQ/ITSW/24-25/03)

(IIBF reserves the right to cancel this request for RFQ and / or invite afresh one with or without amendments to this RFQ, without any liability or any obligation for such RFQ and without assigning any reason. Information provided at this stage is indicative and IIBF reserves the right to amend / add further details in the RFQ document.)

TO BE SUBMITTED ON OR BEFORE

30th September 2024

ADDRESSED TO:

Director Operations
Corporate Office
Indian Institute of Banking & finance
Kohinoor City, Commercial II, Tower I,
2nd Floor, Kiroli Road,
Kurla – (West)
Mumbai – 400 070.



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1. ABOUT IIBF :

Established in 1928 as a Company, Indian Institute of Banking & Finance (IIBF), formerly known as “The Indian Institute of Bankers (IIB)”, is a professional body of banks, financial institutions and their employees in India with a Mission to develop professionally qualified and competent bankers and finance professionals primarily through a process of education, training, examination, consultancy/counseling and continuing professional development programs. During its 96 years of service, IIBF has emerged as a premier institute in banking and finance education for those employed as well as seeking employment in the sector. Since its inception, the Institute has awarded several banking and finance qualifications, viz., JAIB, CAIB, Diplomas and Certificates in specialized areas and helped the practitioners of banking and finance to sustain their professionalism through continuing professional development programs.

IIBF is an ISO 21001-2018 certified organization having its Corporate Office at Kurla, Mumbai and MSS Department at Cuffe Parade in Mumbai and three Professional Development Centers one each at Mumbai, Delhi, Chennai and Kolkata.

2. Major Activities of the Institute:

Membership: IIBF has got over 10 lakh individual members. There are 656 Institutional members (Banks and Financial Institutions).

Courses Offered: The Institute currently offers the following courses such as

- **JAIB**
- **CAIB**
- **Diploma in Banking and Finance**
- **Diplomas** like Diploma in Treasury, Investment and Risk Management, Diploma in Banking Technology, Diploma in International Banking and Finance, Advance Diploma in Wealth Management etc.
- **Certificate Courses** in Anti-Money Laundering and Know Your Customer, Trade Finance, Information System Banker, IT Security, Cyber Crimes & Prevention of Fraud Management, FEMA, Rural Banking, Emerging Technologies, Strategic Management & Innovation in Banking etc.
- **Blended Courses** in Credit Management, Treasury, Compliance, Risk Management etc.
(for details visit- www.iibf.org.in).

All these examinations are backed by specially developed courseware. The Institute has published these courseware and they are available with the publishers viz. M/s Macmillan India Ltd., M/s Taxman Publications Pvt. Ltd and also with leading bookshops.

Web Portal: The Institute provides educational support through its portal for the various courses of the examinations through e-learning, virtual classes and video lectures. It offers web-based professional skill-set development courses in select areas.



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3. Introduction of the Assignment:

The Institute wish to identify a prospective service provider to offer a Subscription to Microsoft Office 365 Cloud Services. Initially, the contract will be for a period of 1 year and it may be extended based on best prices offered by the Microsoft to the vendor. The product shall be used at Institutes in its Corporate office in Kurla (Mumbai), MSS Department (Cuff parade- Mumbai), and Professional Development Centers in Mumbai, Chennai, Delhi and Kolkata (Details of the Locations are given in “Annexure-I). The complete details of these items are given in respective annexures.

Currently, the Institute is availing cloud-based email solution of Zimbra. for office automation activities the Institute is using Microsoft Office 2016 Std. which is on extended support. Below are the existing corporate email details deployed at IIBF.

S. No	Type of user	Total Users	Allocated Quota
1.	Archive user	48 out of 90	NA
2.	Professional user	9	Approx. 40 GB
3.	Business user	81	Approx. 422 GB



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4. Brief Scope of Work:

4.1 Specifications and Requirements

The Scope of Work (SOW) for Annual Subscription for Microsoft Office 365 Cloud Services on a Software-as-a-Service (SaaS) model initially for a period of 1 year as detailed below:

a) Cloud Service Licenses

1. Annual Subscription licenses for IIBF are sought for the following:

License Type	Qty.
Office 365 Business Standard	90
Exchange Online Archiving (EOA for Exchange Online)	90
Advance Threat Protection (Office 365 ATP Plan 1)	90

2. IIBF has **iibf.org.in** as its domain for the above accounts and would like to continue its mailing services with the same domain name.
3. A provision to upgrade the subscription licenses to higher plans anytime during the contract period should be available within the support period.
4. A provision to delete an excess number of subscription licenses will be reviewed annually by the Institute before the renewal of the contract period. The Institute may decrease the licenses that may arise owing to retirements, resignations etc., and accordingly, the license count/cost shall be revised annually.
5. A provision to add new subscription licenses should be available during the contract period at the same cost on a pro-rata basis.

b) General Service Requirements:

1. The selected bidder will assist in handling all aspects related to the Office 365 Admin Center during the contract period.
2. The selected bidder will assist in fetching all the MIS Reports as and when requested by the Institute from the Admin Center services.
3. All data of the Office 365 solution including archival should reside in India.
4. The selected bidder will provide Audit Trails available in Office 365, as and when requested by IIBF.
5. The selected bidder will provide reports and summaries as and when required for the ATP solution deployed.



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c) One-time Activities:

1. Migration from Zimbra cloud email solution to Microsoft Office 365 User Accounts: IIBF is using the Zimbra cloud email solution for around 90 users which are required to be migrated into the licensed Microsoft Office 365 Cloud Services along with all the data stored by the users in their mailbox, devices (.pst-size of approx. 20GB of each user) and archived data. It will be the responsibility of the service provider to migrate the complete email data to the Office 365 cloud. Additionally, the service provider will be responsible for moving user's data from desktop/laptop to Microsoft Office 365 One Drive cloud storage. During migration, the bidder needs to provide resources for moving user's data from desktop/laptop to Office 365 for each location. After migration, the physical presence/remote support of the resource would be required based on the severity of the cases.
2. Creation of new Microsoft Office 365 accounts and onboarding all the necessary services to the users.
3. All the cloud service features under Microsoft Office 365 Business Standard have to be enabled and configured suitably for the users as per the scope of work.

d) Solution Implementation:

1. The Selected Bidder shall implement the solution as required to meet the requirements of IIBF.
2. The resource deployed by the Service Provider to implement the solution should be competent and proficient to implement the solution as per the scope of work.
3. Add/ update DNS name, MX Pointer, CNAME, Auto discover, SIP, SPF records to verify and activate Office 365.
4. All standard email security protocols and methods like DMARC, DKIM, ATP, SPF etc. should be configured in Office 365.
5. Project Documentation and Stabilization support.
6. Assignment of licenses and user activation as per profiles/ requirements provided by IIBF.
7. The existing IIBF domain (iibf.org.in) has to be configured and all the necessary settings should be carried out to facilitate access to email and other services from Microsoft Office 365.
8. Creation of Solution Portal and customization of the portal interface as per IIBF'S requirement.
9. Design custom home page for IIBF mail.
10. Service Provider should ensure solution compatibility with IIBF's Desktop/Laptop build of Windows 10 and above/Mac OS and all commonly used browsers viz. Chrome, Mozilla, Firefox, Safari, Edge etc.
11. Service Provider shall ensure to facilitate IIBF to make use of all the features and functionalities of the selected plan and its constituent components.
12. The Service Provider should have a presence in Mumbai Region.



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e) Data Migration:

The Service provider shall be responsible for the successful data migration of existing Zimbra cloud/Outlook mailboxes/Archival considering the following:

1. The Service Provider shall develop a data migration strategy covering data migration and testing, in consultation with IIBF.
2. Migration of mailboxes shall be done including all the emails, calendars, contacts, folders, and subfolders contained within a mailbox & emails.
3. Any additional software tool required for the migration of mailboxes shall be the responsibility of the Service Provider and IIBF will not make any additional payments towards the same.
4. The Service Provider shall ensure that during migration activity, there is no mail communication disruption faced by IIBF as well as external users.

4.2 Support Service

Support Service at MSS Dept. Mumbai and 4 PDCs at Mumbai, Delhi, Chennai, Kolkata and upcoming centers:

The service provider should make all necessary arrangements to offer the support services at the Membership Services Dept., Cuffe Parade, Mumbai, 4 Professional Development Centers located at Mumbai, New Delhi, Chennai, Kolkata and upcoming centers. The service provider should provide the details of contact persons, call logging mechanism and escalation matrix at the above locations. Any call logged before 2 PM on a day, should be resolved on the same day. In any case, a call logged should be resolved and closed within one working day.

4.3 Specifications

- i. The complete Institute's Location details are given in Annexure -I
- ii. The commercial Template for item-wise charges is given in Annexure- II
- iii. The bidder is required to go through the above annexures before submitting the bids.

5. Bidding Process:

Eligible bidders are invited to submit the bids in separate sealed envelopes for Commercial bids as per Annexure-II.



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6. Schedule of activities of Bidding:

The schedule of activities of the bidding process is as under:

Sr. No	Description	Date
1	Releasing of Request for quotation (RFQ)	11 th September 2024
2	Last date of submission of written requests through email for any Clarifications from prospective bidders. Queries may be forwarded to itbids@iibf.org.in Response for the same will be provided by 23rd September 2024 .	16 th September 2024
3	Last date of submission of bids up to 3 PM.	30th September 2024

The above dates are tentative and IIBF reserves the right to change the schedule of activities, including the associated dates.

7. Minimum Eligibility Criteria:

Sr.	Minimum Eligibility Criteria	Supporting Document
1	The bidder should have been in the business of minimum support of 5 years in email solutions out of which 2 years in managing Office 365 cloud-based services.	Certificate of incorporation
2	The bidder should have a turnover of Rs. 3 Crores or above during each year for the last three completed financial years.	Self-certified copies of the audited balance sheet and profit & loss statement for the last 3 completed financial years.
3	The bidder should have executed a similar kind of project in managing Office 365 cloud-based services in educational institutions/Banks/PSUs preferably in multiple locations with similar size of organization.	<ul style="list-style-type: none">• PO• Project completion report
4	The bidder should have at least a team of 5 qualified, certified and experienced resources to install and manage the solution.	Number of resources with appropriate qualifications and certification of year/s of experience.
5	For support services, the bidder should have remote service delivery infrastructure to ensure immediate response and faster resolution of problem reported.	Detailed address of support offices in metros (Mumbai, Delhi, Chennai and Kolkata)
6	The bidder should have either direct authorization from OEM or should be authorised distributor for support and management of Office 365.	Copy of a OEM or authorized distributor certificate.
7	The bidder should have never been blacklisted/barred/disqualified by any regulator/statutory body or any company	Copy of a declaration



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Note:

- Supporting documents requested should be arranged / numbered in the same order as mentioned above.
- Failure to meet any of these criteria shall disqualify the bidder and it shall be eliminated from further process.
- The Institute reserves the right to verify and/ or to evaluate the claims made under eligibility criteria and any decision in this regard shall be final, conclusive and binding upon the bidder.

8. Contract Duration:

Initially, the tenure of the contract shall be for 1 year. Further, the contract will be renewed annually based on the best prices offered by the Microsoft to the vendor, which would be compared with charted prices from Microsoft.

9. Proposal Format:

The commercial proposals should be submitted in a sealed cover and labelled with the “Proposal for subscription to Microsoft Office 365 cloud services on a Software-as-a-Service (SaaS) model”

- The bidder should submit the proposals with a clarity & proper pagination so that the papers are not lost.
- The proposals, which are not sealed or bids sent through e-mail shall be summarily rejected.
- The proposals which are not submitted in the prescribed format or having incomplete in details are liable for rejection.
- The proposals containing unauthenticated erasing or alterations shall not be considered.
- A covering letter duly signed by an authorized person of the firm/company on its letter head with his/her name, title and seal should be submitted to the Institute along with the following:
 - Table of Contents (List of documents enclosed)
 - Proof of implementation of a similar project.



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10. Terms and Conditions:

- The bidder shall assign a Project Manager who shall act as a single point of contact for all activities regarding this project. In case the project manager leaves midway during the currency of the project, the bidder should make an alternative arrangement by assigning another project manager to this project.
- The bidder shall bear all costs associated with the preparation and submission of the proposal, attending pre-bid meetings or arranging product walkthrough etc. IIBF shall provide no reimbursement for such costs.
- Any effort by a bidder to influence the IIBF on any matter relating to the proposal, its evaluation, comparison, or selection may result in the rejection of the bidder's proposal.
- In case of termination of the contract from either side, the bidder should hand hold entire data to the Institute including the contents of all email boxes.

11. Termination of contract:

Both the parties have the right to terminate the contract by giving three months' notice in writing. In case the vendor terminates the contract, they should help Institute to port with another vendor without any additional charges to the Institute during the contract period.

12. Payment Schedule for AMC:

Payment shall be made on an annual basis and the same shall be released within 45 days of submission of the valid invoices with all the reports.

13. Sub-contracting:

The Bidder shall not subcontract, delegate or permit anyone other than the bidder's personnel to perform any of the work, service or other duties required of the bidder under this agreement without the prior written consent of the Institute.

14. Training:

The bidder has to provide 2 days training for all users/admin after the commissioning of the product. The schedule of the training shall be decided later.



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15. Non-Disclosure:

The contents of the quotation and all the project outputs should not be disclosed to any party unless Bidder and IIBF mutually agree in writing to the same. Bidder shall not use the contents of this RFQ to bid for any other contract.

The following Annexures shall form part of the RFQ and should be read together while submitting the proposal.

Annexure –I:- Institute’s Location Details.

Annexure- II:- Commercial Template for item-wise charges.

Annexure-III:-Declaration regarding clean track by Bidder

16. Contract Agreement:

The vendor needs to enter into an agreement with mutually agreeable terms and conditions after issue of the order letter. The draft will be provided by the Institute at the end of the RFQ process.

- **The Institute reserves the right to change / add / modify / relax any / all conditions stipulated or increase / decrease items requested as also to accept / reject any / all offers without assigning any reason whatsoever.**
- **The Institute also reserves the right to cancel this RFQ or go for a fresh one with or without any amendments without any liability or any obligations.**
- **The decision of the Institute in selecting the bidder would be final and conclusive and the Institute shall not entertain any correspondence in this regard.**
- **Bidders are requested to offer the best price, item wise (exclusive of taxes), along with other terms and conditions on or before 30th September 2024 by 3.00 pm in sealed envelopes duly super scribed as “Proposal for subscription to Microsoft Office 365 cloud services on a Software-as-a-Service (SaaS) model”**

The proposal should be addressed and forwarded to:

**Director (Operations)
Indian Institute of Banking & Finance
Corporate Office
Kohinoor City, Commercial II, Tower I,
Second Floor, Kirol Road,
Kurla - West
Mumbai – 400 070.**



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ANNEXURE – I

Institute's Locations Details

ZONE	CONTACT ADDRESS
CORPORATE OFFICE KURLA MUMBAI	Kohinoor City Commercial – II Tower-I, 2nd & 3rd Floor Kirol Road Off-L.B.S Marg Kurla- West Mumbai - 400 070 Phone : 91 - 022 - 25039746 / 9604 / 9907
MSS DEPARTMENT/PDC (WZ), MUMBAI CUFF PARADE	Indian Institute of Banking & Finance 191-F, Maker Towers, 19th Floor, Cuffe Parade, Mumbai - 400 005 Phone : 91-022-2218 3302 Phone : 91-022-2218 5134 Email : iibfwz@iibf.org.in
PDC KOLKATA	Indian Institute of Banking & Finance Avani Heights, 2nd Floor, 59A, Jawaharlal Nehru Road, KOLKATA - 700020 Tel: 033-46032850 Email : iibfez@iibf.org.in
PDC DELHI	Indian Institute of Banking & Finance C-5/30, Safdarjung Development Area (SDA), Near SDA Local Shopping complex Outer Ring Road, Opp IIT Delhi, NEW DELHI-110 016 Phone : 91-011- 2575 2191 Tel:011-2653 2194 / 2191 (office) Email : iibfnz@iibf.org.in
PDC CHENNAI	Indian Institute of Banking & Finance No.94, Jawaharlal Nehru Road (100 Feet Road) Opposite to Hotel Ambica Empire, Vadapalani, CHENNAI - 600 026 Phone : 044 - 24722990, 24727961 Email : iibfsz@iibf.org.in



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**Annexure –II
Commercial Templates for Item wise charges**

Sr. No	Description	Qty. (A)	Item Wise Unit Cost (in Rs.)	Total Amount A x B = (in Rs.) Excluding taxes.
			One-Year Cost (B)	
1	Microsoft Office 365 Business Standard Licenses.	90		
2	Exchange Online Archiving (EOA for Exchange Online).	90		
3	Advance Threat Protection (Office 365 ATP Plan 1).	90		
4	Support Service	01		
5	One-time Implementation Cost as per Scope of Work including migration.	01		
6	One-time Training Cost.	01		
			Total Charges	

*Taxes shall be extra.

Note: - The Institute may increase or decrease the above items based on the requirement. During the contract, the unit cost of the newly added item will be applicable on a pro-rata basis of the contract year.

Yours faithfully,

Authorized Signatory

Name:

Designation:

Place:

Date:

Organization Seal



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Annexure-III
Declaration regarding clean track by Bidder

To,
Director (Operations)
Indian Institute of banking and finance
Kohinoor city, Commercial II, Tower I,
2nd Floor, Off L.B.S Marg, Kirod Road
Kurla West, Mumbai -400070.

Dear Sir,

Subject:- Request for Proposal for subscription to Microsoft Office 365 cloud services on a Software-as-a-Service (SaaS) model (No:- RFQ/ITSW/24-25/03)

We have carefully gone through the Terms and Conditions contained in the above-referred RFQ. We hereby declare that our company/firm is not currently debarred/blacklisted by any Government/Semi Government Organizations/Institutes in India or abroad. I further certify that I am a competent officer in our company/firm to make this declaration.

OR

I declare the following

Sr.No	Country in which the company is debarred/blacklisted/case pending	Blacklisted/debarred by Government/Semi Government Organizations/Institutes	Reason	Since when and for how long

(Note: In case the company/firm was blacklisted previously, please provide the details regarding periods for which the company/firm was blacklisted and the reasons for the same)

Yours faithfully,

Authorized Signatory

Name:
Designation:
Place:
Date:

Organization Seal