

**REQUEST FOR PROPOSAL
FOR
SELECTION OF SYSTEM INTEGRATOR (SI)
FOR DESIGN, DEVELOPMENT, IMPLEMENTATION
AND MAINTENANCE OF
PFRDA WEBSITE
(PFRDA Connect)**

RFP Reference No: PFRDA/2024/TARCH/PFRDA-Connect/01

Dated: 6th November 2024

Tender Issuing Authority

PENSION FUND REGULATORY AND DEVELOPMENT AUTHORITY(PFRDA)
E-500, Fifth Floor, Tower E, World Trade Centre, Nauroji Nagar, New Delhi – 110029

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1. Disclaimer

- 1.1 The information contained in this RFP is selective and is subject to updates, expansion, revision and amendment at the sole discretion of PFRDA. The information contained in this RFP or provided subsequently to Bidder(s) in documentary form/email by or on behalf of PFRDA, shall be deemed to be part of this RFP.
- 1.2 The purpose of this RFP is to provide the interested Bidder(s) with information to assist them in preparation of their Bid proposals. This RFP does not claim to contain all the information each Bidder may require. Each Bidder should conduct its own investigations and analysis, and should check the accuracy, reliability and completeness of the information contained in this RFP and where necessary obtain independent advice/clarifications, at their own cost. PFRDA may in its absolute discretion, but without being under any obligation to do so, update, amend or supplement the information in this RFP to get the best proposal.
- 1.3 PFRDA, or any of its officers or employees, or any of their advisers/consultants makes no representation or warranty and shall have no liability to any person, including any Bidder under any law, statute, rules or regulations or tort, principles of restitution or unjust enrichment or otherwise for any loss, damages, cost or expense which may arise from or be incurred or suffered on account of anything contained in this RFP or otherwise, including the accuracy, adequacy, correctness, completeness or reliability of the RFP and any assessment, assumption, statement or information contained therein or deemed to form or arising in any way for participation in this bidding process by bidders.
- 1.4 PFRDA accepts no liability of any nature whether resulting from negligence or otherwise, howsoever caused from reliance of any Bidder upon the statements contained in this RFP.
- 1.5 Bidders are presumed to have examined all instructions, forms, terms, and specifications in this RFP along with the eligibility conditions as on the date of submission of its bid. Failure to furnish all information required under this RFP or to submit a Bid not substantially responsive to this RFP in all respect will be at bidder's risk and may result in rejection of the Bid. Bidder shall have an obligation to disclose all material facts in relation to itself which may have a potential bearing on its competence to enter into and execute the project satisfactorily.
- 1.6 This RFP is not an offer by PFRDA but an invitation to receive proposals/bids from interested and eligible bidders for selection of System Integrator for the design, development, and maintenance of the project for PFRDA.
- 1.7 No contractual obligation whatsoever shall arise from the RFP process unless and until a formal contract is executed between PFRDA and the successful bidder. PFRDA reserves the right to cancel the selection process at any stage, prior to the appointment of System Integrator and signing the contract, without any liability owed to any party.
- 1.8 This RFP is being issued with no financial commitment and PFRDA reserves the right to withdraw the RFP and change or vary any part thereof or foreclose the same at any stage.
- 1.9 This RFP document shall not be transferred, reproduced, or otherwise used for purpose other than for which it is specifically issued.

2. Abbreviations

| # | Abbreviation | Explanation |
|----|--------------|--|
| 1 | AMC | Annual Maintenance Contract |
| 2 | AMC | Annual Maintenance Contract |
| 3 | API | Application Programming Interface |
| 4 | BCP | Business Continuity Planning |
| 5 | BG | Bank Guarantee |
| 6 | CERT-In | Indian Computer Emergency Response Team |
| 7 | CI CD | Continuous integration and continuous delivery/Continuous deployment |
| 8 | Cloud DC-DR | Cloud Data Centre- Disaster Recovery |
| 9 | CMMI | Capability Maturity Model Integration |
| 10 | CMS | Content Management System |
| 11 | CRAs | Central Record Keeping Agencies |
| 12 | CRM | Customer Relationship Management |
| 13 | CSS | Cascading Style Sheets |
| 14 | CSV | Comma-separated values |
| 15 | CTA | Call to Actions |
| 16 | DAM | Database Activity Monitoring |
| 17 | DAST | Dynamic Application Security Testing |
| 18 | DB | Database |
| 19 | DBA | Database Administrator |
| 20 | DR | Disaster Recovery |
| 21 | EMD | Earnest Money Deposit |
| 22 | EOI | Expression of Interest |
| 23 | ERP | Enterprise Resource Planning |
| 24 | FRS | Functional Requirement Specification |
| 25 | FSDC | Financial Stability and Development Council |
| 26 | FSLRC | Financial Sector Legislative Reforms Commission |
| 27 | GB | Giga Byte |
| 28 | GIGW | Government of India guidelines for websites |
| 29 | HTML | Hypertext Mark-up Language |
| 30 | IA | Information Architecture |
| 31 | IOPS | Input/ Output Operations Per Second |
| 32 | IS | Information Security |
| 33 | ISO | International Organization for Standardization |
| 34 | JSON | JavaScript Object Notation |
| 35 | NDA | Non-Disclosure Agreement |
| 36 | NIC | National Informatics Centre |
| 37 | OEM | Original Equipment Manufacturer |
| 38 | OS | Operating System |
| 39 | OWASP | Open Web Application Security Project |

| | | |
|----|-------------|--|
| 40 | PFRDA | Pension Fund Regulatory and Development Authority |
| 41 | PFRDA Pulse | PFRDA unified lead solutions for empowerment |
| 42 | PFRDA TRACE | PFRDA - Tracking Reporting Analytics & Compliance e-Platform |
| 43 | PII | Personal Identifiable Information |
| 44 | PINTRA | PFRDA Intranet portal- Internal Digitalization |
| 45 | PO | Purchase Order |
| 46 | PSE | Public Sector Enterprise |
| 47 | PSU | Public Sector Undertakings |
| 48 | PWA | Progressive Web Application |
| 49 | QA | Quality Assurance |
| 50 | RFP | Request for Proposal |
| 51 | RPO | Recovery Point Objective |
| 52 | RSS | Really Simple Syndication |
| 53 | RTO | Recovery time objective |
| 54 | RTP | Real-Time Transport Protocol |
| 55 | SAST | Static Application Security Testing |
| 56 | SEO | Search Engine optimization |
| 57 | SI | System Integrator |
| 58 | SIEM | Security Information and Event Management |
| 59 | SLA | Service Level Agreement |
| 60 | SOW | Statement of Work |
| 61 | SPA | Single Page Application |
| 62 | SRS | System Requirement Specification |
| 63 | SSDLC | Secure System Development Lifecycle |
| 64 | SSL | Secure Sockets Layer |
| 65 | STQC | Standardization Testing and Quality Certification |
| 66 | TCO | Total Cost of the Ownership |
| 67 | TLS | Transport Layer Security |
| 68 | UAT | User Acceptance Testing |
| 69 | UI | User Interface |
| 70 | URL | Uniform Resource Locator |
| 71 | UX | User Experience |
| 72 | VAPT | Vulnerability Assessment & Penetration Testing |
| 73 | VPN | Virtual Private Network |
| 74 | W3C | World Wide Web Consortium |
| 75 | WAF | Web Application Firewall |
| 76 | WCAG | Web Content and Accessibility Guidelines |
| 77 | WYSIWYG | What You See Is What You Get |
| 78 | XHTML | Extensible Hypertext Mark-up Language |
| 79 | XML | Extensible Mark-up Language |

3. Definitions

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

1. **Agreement** - means the contract signed between PFRDA and the Selected Bidder and all the documents attached hereunder. The “Agreement” shall also include the RFP, amendments, corrigenda, response of the selected vendor to the RFP and the contract document itself. “Agreement” and “Contract” has been used interchangeably.
2. **Annual Maintenance Contract (AMC)** - means the agreed post implementation and warranty, support and maintenance which the selected bidder will provide during the four years of O & M period.
3. **Authorised Signatory** - means the person authorized by the company’s Board/ Managing Director/ Director for signing the bid documents on behalf of the company. The authorized signatory should give a declaration and through authenticated documentary evidence to establish that he/she is empowered to sign the bid documents and bind the bidder.
4. **Authority** - means the Pension Fund Regulatory and Development Authority (PFRDA), a Statutory Body established under the PFRDA Act, 2013.
5. **Availability** - shall mean the time for which the services offered are available for conducting operations from the cloud infrastructure / total solution.
6. **Bidder** - means an eligible Indian entity/firm submitting a Proposal/Bid in response to this RFP.
7. **Commissioning** - means, the System shall be considered to have been commissioned, when the entire job, including development, supply, installation, integration, configuration, testing and deployment of all cloud infrastructure & software is executed in accordance with the scope of work as defined in this RFP to the satisfaction of the PFRDA.
8. **Contract** – Same as Agreement defined above
9. **Downtime** - means accumulated time during which any of the services which is meant to be available to PFRDA stakeholders is not available within the Scheduled Operation Time but outside the scheduled maintenance time.
10. **Free Text Searching** - Ability to search for content based on an arbitrary set of keywords. Proximity rules may also be added to the search criteria.
11. **Full-Text-Search** - The ability to search a data file for specific words, numbers and/or combinations or patterns thereof
12. **Go Live** - means implementation of complete solution as per requirements mentioned in this RFP.
13. **Incident** - refers to any event / abnormalities in the functioning of any of the components of the “Total Solution” that may lead to disruption in normal operations and services
14. **Integration** - means the system should be able to integrate or interact with components/applications to fulfil a part or full-service obligation including using other 3rd party integration approved by the authority, if required.

15. **Letter of Award** means a formal letter signed and sealed by the purchaser which is send to the selected bidder after the due process of bid evaluation. The issue of letter of award shall mean acceptance of the bid upon due evaluation that competent vendor has been identified, both technical proposal and commercial value negotiated is acceptable and the selection process has thus been completed by PFRDA.
16. **Letter of Intent** means a formal letter signed and sealed by the purchaser which is send to the selected bidder after the due process of bid evaluation. The issue of letter of intent shall mean that competent vendor is formally informed as winner of bid evaluation process.
17. **Man-day** – 8 hours of work of a qualified person.
18. **Go-live** – means the day when the product development, including testing and security compliance has been achieved as per the scope of work as defined in this RFP and it has been taken to production for operationalization.
19. **Proposal / Bid** - means the written reply or submission of response to this RFP by the bidders which shall include a comprehensive detailing of how the bidder plans to execute the scope of work and fulfil the Service Level Agreement (SLA) obligations, including the financials as per the terms & conditions of the RFP.
20. **Response time** - is defined as the time between receipt of the incident by support team from the user, its logging / generation of ticket on the system
21. **Restoration Time** - shall mean the time taken (after the incident has been reported to the support team) till resolution of the incident and recovery.
22. **Request for Proposal (RFP)** – means this document in its entirety, inclusive of any amendments or corrigenda if any released by PFRDA for all bidders.
23. **Service Period** - means a period of five (05) years (contract period including design, development and implementation period of six (06) months, warranty & stabilization period for six (06) months and four (04) years of Comprehensive AMC Support) starting from the date of commencement of the project.
24. **Services / SoW / Work** – “Services”, “SoW” or “Work” means all services, scope of work and deliverables to be provided by a Bidder as described in the RFP and include services ancillary to the development of the solution, such as implementation, installation, provision of technical assistance, training, support, maintenance, commissioning and other obligation of the Bidder.
25. **SI/System integrator/Successful Bidder or Vendor** - means any firm / company, etc., to whom work has been awarded and whose Bid has been accepted by Purchaser and shall include its authorized representatives, successors and permitted assignees.
26. **Site** - means the place where the product / service / solution is to be delivered, commissioned or places approved by PFRDA for the purposes of the Contract together with any other places designated in the Contract as forming part of the Site.
27. **System/ solution/ product (PFRDA)/ platform** - “System” or “solution” means and includes the cloud infrastructure, software, etc. required for operationalising the proposed solution and to provide the Services as mentioned in the RFP.
28. **T** – Technical Score of the Bidder

29. **T High** – The Bidder with the highest technical score shall be ranked as T1 and be considered as T High for the techno-commercial score
30. **Total Cost of Ownership/Project Cost/TCO** - The price payable to SI over the entire period of Contract for the full, proper and satisfactory performance of its contractual obligations. This cost would be initial cost/ development/ customisation cost /installation cost/commissioning cost/training cost/technical assistance cost/warranty cost/AMC Cost
31. **Warranty** –This is the period commencing after “go-live” during which the bidder would be required to undertake all necessary modifications not falling under the purview of change request such as updates, bug fixes or any other support as and when required, without any additional cost.
32. **Week** – 5 Calendar days.

4. Notice Inviting Bids (NIB)

RFP Reference No: PFRDA/2024/TARCH/PFRDA-Connect/01

RFP Name: REQUEST FOR PROPOSAL FOR SELECTION OF SYSTEM INTEGRATOR (SI) FOR DESIGN, DEVELOPMENT, IMPLEMENTATION AND MAINTENANCE OF PFRDA WEBSITE (PFRDA-CONNECT)

Pursuant to this RFP, the Pension Fund Regulatory and Development Authority (PFRDA) invites prospective bidders to submit their bids for undertaking the design and development of its website, as described below:

PFRDA-Connect

1. Pension Fund Regulatory and Development Authority (PFRDA) plans to develop a new website incorporating an enterprise grade CMS. The website functions as a crucial hub, providing essential information as per PFRDA mandate across various sections and pages disseminating notifications and research relevant contents.
2. The Pension Fund Regulatory and Development Authority (PFRDA) aims to enhance its visibility and strengthen its regulatory role through its new website, while also improving stakeholder engagement with more intuitive and responsive user interfaces. This will be achieved by leveraging an enterprise-grade CMS platform and the latest technologies. The new website will be designed to simplify communication about PFRDA's functions and regulatory guidelines, elevate its brand presence across regions, and showcase a modern, proactive approach to its operations. The ultimate goal is to create a more engaging, user-friendly platform that utilizes advanced technology to boost interactivity and significantly enhance the overall user experience.
3. Through this RFP, PFRDA seeks a detailed technical and financial proposal from qualified bidders for providing the end-to-end solution for website as desired.
4. Interested bidders are advised to carefully go through the entire RFP before submission of Bids, understand fully their eligibility and capability to undertake and execute the work submit their proposals in accordance with the instructions provided in this Request for Proposals (RFP) document
5. Address for submission of Bids, contact details including email address for sending communications are given in [Schedule of Events](#) of this RFP.

5. Schedule of Events

REQUEST FOR PROPOSAL FOR SELECTION OF SYSTEM INTEGRATOR (SI) FOR DESIGN, DEVELOPMENT, IMPLEMENTATION AND MAINTENANCE OF PFRDA WEBSITE (PFRDA-CONNECT)

| | |
|--------------------------------------|---|
| Name and Address of the Organization | Pension Fund Regulatory and Development Authority E-500, Tower E, 5th Floor, World Trade Centre, Nauroji Nagar, New Delhi-110 029 |
| RFP Ref. no. | RFP Reference No: PFRDA/2024/TARCH/PFRDA-Connect/01 |
| Bid processing Fee | Rs. 25,000/- (Rupees Twenty-five thousand only) plus GST @18% as applicable that is Rs 29,500 (Twenty-nine thousand and five hundred only). Bid processing fee to be transferred electronically to PFRDA designated Bank Account or submitted in the form of Account payee demand draft in favour of PFRDA, New Delhi. Details of bank accounts are given in this table. <i>Note:</i> Bidders who have had expressed interest against EOI for TARCH project Ref no.: PFRDA/2022-23/IT/02 issued on 27 June 2022 and not submitted bid for RFP ref. no.: PFRDA/2023/TARCH/PINTRA/01 (issued on 4th July 2023) and for RFP ref. no.:PFRDA/2024/TARCH/PFRDA-TRACE/01 (issued on 31 st January 2024) are exempted from submitting Bid Processing fee. |
| Earnest Money Deposit (EMD) | Rs 20,00,000 (Rupees Twenty Lakhs only) EMD should be submitted by the bidders in the form of a Bank Guarantee (BG)/ Demand-draft issued by a Scheduled Commercial bank lien marked in favour of PFRDA in the designated bank account of PFRDA. The EMD submitted in the form of bank guarantee/Demand-draft should be valid up to at least 180 days from the bid submission end date. |
| Performance Security | 10% of the /Total Cost of Ownership (TCO)/ Total Contract Value as quoted in financial bid. Performance Security to be submitted by the Successful Bidder in the form of a Bank Guarantee (BG) which should be valid at least up to 180 days from the date of completion of the contract. The successful bidder shall extend the Performance Security depending on the extension of the Contract period. Performance security should be valid at least up to 180 days from the date of completion of the contract. The successful |

| | |
|---|---|
| | bidder shall extend the BG validity depending on the extension of the Contract period. |
| Date of Publishing the RFP | 06 November 2024 |
| Last date of submission of pre-bid queries | 14th November 2024 up to 1800 Hours |
| Email id on which pre-bid queries to be sent | itprojects-pfrda@pfrda.org.in |
| Date, Time, and Venue of Pre-bid Meeting | 21st November 2024 PFRDA Office at 15:00 hrs |
| Project Head | Shri. Sumit Kumar - Chief General Manager In charge – PFRDA-Connect |
| Nodal Officer details for IEM Co-ordination of the RFP | Dr. Shilpa Vijaivargia, IT Project Manager, PFRDA Email : it-projmgr@pfrda.org.in |
| Bid Submission Start Date | 6th November 2024 |
| Bid Submission End Date and Time | 9th December 2024 up to 1500 Hours |
| Address for Submission of RFP Document (through speed post/registered post/in person) to be submitted in the tender box located at the reception of PFRDA office premises | Chief General Manager In charge- PFRDA-Connect Pension Fund Regulatory and Development Authority E-500, Tower E, 5th Floor, World Trade Centre, Nauroji Nagar, New Delhi-110 029 |
| Technical Bid Opening Date and Time | 9th December 2024 at 1530 Hours at PFRDA Office |
| Presentation by the bidders | To be communicated to the eligible bidders at the later stage. |
| Financial bid Opening Date and Time | To be communicated to the technically qualified bidders at the later stage. |
| Issue of Letter of Intent (LOI) to the successful bidder | After approval from the Competent Authority |
| Contract Finalization and award | After approval of the Competent Authority and on receipt of required Performance Security & Non-Disclosure Agreement (NDA) |
| Bid Validity | 180 Days from the bid submission end date |
| PFRDA Bank Account details | Beneficiary Name – Pension Fund Regulatory and Development Authority Bank Name - Indian Overseas Bank Branch Name – F-75, Poorvi Marg, Vasant Vihar Branch, New Delhi-110057 |

| | |
|-----------------|--|
| | Account No – 159901000000855 IFS Code – IOBA0001599 |
| PFRDA GSTIN no. | 07AAALP0291L1ZU |

6. Introduction

- 6.1 Pension Fund Regulatory and Development Authority is a statutory body, which operates within the legal framework of PFRDA Act, 2013, with an objective to promote old age income security by establishing, developing, and regulating pension funds, to protect the interests of subscribers to schemes of pension funds and for matters Connected therewith or incidental thereto.
- 6.2 The Pension Fund Regulatory and Development Authority Act (23 of 2013) (“PFRDA Act/the Act”) was notified on 1 February 2014 in the Gazette of India. PFRDA is regulating the National Pension System (“NPS”), subscribed by the employees of Govt. of India, State Governments and by employees of private institutions/organisations & unorganised sectors. Later, in the year 2015, a government-backed minimum guarantee pension scheme named “Atal Pension Yojana” (“APY”), primarily targeted at the unorganised sector, was launched by the Government of India on 09 May 2015 and the administration of the scheme has been handed over to PFRDA. PFRDA also regulates NPS Vatsalya, a pension scheme for minors.
- 6.3 PFRDA is responsible for regulation & supervision of various intermediaries such as Central Record Keeping Agencies (CRAs), Pension Funds (PFs), Point of Presence (POPs), Custodian, Trustee Bank, etc. PFRDA has a significant role to play in safeguarding the interest of the subscribers. It regulates the way each intermediary function under the NPS architecture so as to ensure fair play for subscribers. It also ensures that all stakeholders/intermediaries comply with PFRDA Act and Rules /Guidelines/Regulations/Circulars issued by PFRDA Act from time to time. The duties, roles and responsibilities of the Authority are as per Sec 14 of PFRDA Act, 2013.
- 6.4 The Authority consists of the following Members, namely:
1. Chairperson.
 2. Three whole-time members.
 3. Three part-time members.

The following table gives an insight about PFRDA’s organization structure:

| Sr. No. | Departments |
|---------|-------------------------------------|
| 1 | Regulation |
| 2 | Supervision |
| 3 | Promotion & Development - APY & NPS |

| | |
|----|--|
| 4 | Communication & Media, Financial Literacy, Secretariats, Regulation Review Secretariat, Pension Sanchay, NCFE, SEPF, Helpdesk - APY/NPS, Training, Annual Report, FSLRC, FSDC, IOPS, Inter Regulatory Matters, |
| 5 | HR & Admin, Rajbhasha |
| 6 | Finance and Accounts |
| 7 | IT, Fintech & Data Analytics, TARCH |
| 8 | Legal, Internal Audit, RTI & PQ, Enforcement & Adjudication, Investigation, Vigilance, Grievance Cell, Ombudsman, Public Grievance Portal, CPENGRAM |
| 9 | Policy Research, Systemic Risk Management, Market Watch, Pension Bulletin. |
| 10 | Innovation Hub |
| 11 | Investigation and Surveillance |

7. Objective

- 7.1 The overarching goal of the PFRDA-Connect project is to significantly enhance the digital presence of PFRDA by overhauling its official website, leading to improve user experience throughout the entire user journey. This enhancement will specifically target the needs of PFRDA's diverse user base through the deployment of an easy-to-use, modular, and interactive solution based on the latest technological advancements. The solution will include a comprehensive future development roadmap and will be hosted on a MEITY-empanelled Virtual Private Cloud (VPC) provider.
- 7.2 Key to this initiative is the establishment of a robust enterprise grade Content Management System (CMS) at the core of PFRDA-Connect, ensuring effective information dissemination and management. The specific objectives of this project include:
- Design and Development with Cloud Hosting:** Implement an enterprise-grade CMS for the design and development of the PFRDA website to enhance user engagement, streamline workflow and content management, and improve the overall user experience. The website will be hosted in a MeitY-empanelled Virtual Private Cloud (VPC).
 - Feature Enhancement:** Integrate new features, functionalities, and options for creating thematic microsites that enhance user interaction with PFRDA ecosystem and accessibility.
 - Improvement of UI/UX:** Upgrade the UI and UX to make the PFRDA main website more intuitive and engaging for all users.
 - Optimization of Search and Information Architecture:** Enhance the website's search capabilities and structural design to align with benchmarks set by leading websites.

- e. Content Strategy Enhancement: Develop a dynamic content strategy that enhances user engagement and ensures the relevance and accessibility of the information.
 - f. Incorporation of Latest Design Trends: Ensure the website design follows the latest trends and complies with both Indian Government directives and international standards.
 - g. Data Migration: Conduct comprehensive data migration, including the de-duplication of links, pages, and documents, to enhance content accessibility and management.
 - h. Regulatory Compliance: Guarantee that the website adhere to GIGW 3.0, W3C, and WCAG 2.2 guidelines, ensuring broad accessibility and compliance.
- 7.3 Through the PFRDA-Connect initiative, PFRDA aims to deliver a superior digital experience that not only meets contemporary technological expectations but also effectively serves its diverse stakeholder base.

8. Current Status of IT landscape

- 8.1 PFRDA's current website is designed and developed by PFRDA through a third party agency and hosted by National Informatics Centre. Contents are provided and maintained by PFRDA.
- 8.2 PFRDA is in a development process of a turn-key project (TARCH) comprising of an internal ERP (PULSE) & single window for all intermediaries' regulatory & supervisory processes with BI and reporting (TRACE). This RFP is issued in respect of design, development, implementation and maintenance of the website.
- 8.3 PFRDA is using e-office, a software solution provided by NIC, as an e-File and Collaborative tool for Knowledge Management module that is used mainly for file management and Document Management. e-office will be continued as File Management System.
- 8.4 Current PFRDA website (<https://pfrda.org.in>) and PFRDA Financial Literacy Initiative website (<https://pensionsanchay.org.in>) are hosted on the NIC Cloud. PFRDA has a portal for Retirement Advisers named as RP portal (<https://reap.pfrda.org.in/pfrdareap/>). RP portal and e-office are hosted on NIC data Centre.

9. Scope of Work – PFRDA-Connect

- 9.1 The project comprises of designing and developing for PFRDA Website and further leverage it by using an enterprise grade Content Management System (CMS). This will include migration of data & content from the existing website to the new website. Bidders must ensure that entire end-to-end solution must be on Virtual Private Cloud provided by MeitY empanelled CSP.
- 9.2 The bidder shall be responsible for performing the following task:

- a. Design and development of the website as per the latest GIGW /WCAG guidelines, in discussion with PFRDA, leading to the overall improvement of the user interface and user experience.
- b. Supporting bilingual (Hindi & English) website contents and maintaining the same as required by PFRDA. PFRDA may in certain cases provide content already translated from English to Hindi. However, the website must have capability to translate English contents into Hindi automatically.
- c. Ensure that website is STQC and CERT-In security compliant
- d. Overall branding, UI elements and theme should be consistent across all platforms
- e. AMC services after completion of warranty & stabilization period.

9.3 The bidder should refer to [SCHEDULE II](#) for the required solution features. [SCHEDULE III](#) provides the indicative high-level function requirements which needs to be fulfilled.

10. Comprehensive project outline

The selected bidder will be responsible for executing a comprehensive project to deliver a software solution that fulfills the requirements of the Pension Fund Regulatory and Development Authority (PFRDA) as outlined in this document. The bidder should thoroughly review this RFP to gain a complete understanding of the project's goals and specifications. Please note that the outlined steps are indicative and not necessarily in strict order. The bidder may organize activities as needed to ensure the project is completed within the specified timeline.

The successful Bidder is expected to undertake the following broad steps during the execution of the project:

10.1 Project Initiation

10.1.1 Stakeholder Engagement

The first step in initiating the PFRDA-Connect project shall involve identifying and engaging with all key stakeholders to thoroughly gather their requirements and expectations. This engagement with stakeholders shall be crucial for aligning the project's goals with their needs and ensuring that everyone is on the same page. The selected bidder shall establish clear communication channels to facilitate ongoing dialogue and feedback throughout the project lifecycle. During this phase, roles and responsibilities shall also be clearly defined to ensure that each party (Selected Bidder and PFRDA Stakeholders) understands their duties and contributions to the project's success.

10.1.2 Project Charter Development

The next step shall be to develop a comprehensive project charter. This charter shall serve as the foundational document for the project, outlining the scope, objectives, timelines, and

deliverables in detail. It shall act as a guiding framework for the project team and stakeholders, ensuring alignment on the project's aims. After the project charter is drafted, it shall be submitted for formal approval of the Competent Authority at PFRDA.

10.1.3 Formation of Project Team

The project team should be identified during the proposal stage. The identified project team shall be composed of experts in various domains, including web development, CMS integration, UX/UI design, data migration, security, STQC, Security audit & VAPT certification. Specific roles and responsibilities shall be assigned to each team member, creating a clear structure for the project's execution. Minimum qualification and experience requirement for the key team members are provided in [Section 11](#). Key team members shall be available at the PFRDA office throughout the development phase of the project to coordinate with PFRDA in accordance to the requirement of the project.

10.2 Planning and Design

10.2.1 Requirement Analysis

During the planning and design phase, the project team shall conduct an in-depth analysis of the functional and technical requirements of the PFRDA-Connect initiative. This analysis shall be critical for defining specific objectives related to CMS capabilities, UI/UX improvements, feature enhancements, and compliance. By understanding the detailed requirements, the team shall set clear goals and benchmarks for success.

10.2.2 Project Plan Development

Following the requirement analysis, a detailed project plan shall be developed. This plan shall include comprehensive timelines, milestones, resource allocation, and risk management strategies, all of which are essential for keeping the project on track. The selected bidder shall develop the project plan in Excel and provide it to PFRDA for review and approval.

10.2.3 Design and Architecture Blueprint

The next step in the planning and design phase shall be the creation of a design and architecture blueprint. This blueprint shall include wireframes, prototypes, and detailed architecture diagrams for the website and CMS integration. It shall serve as a visual representation of the project's end goals and shall be reviewed and refined with stakeholders to ensure alignment with the project's objectives. The blueprint shall act as a roadmap for the development team, guiding the technical execution of the project.

10.2.4 Regulatory and Compliance Review

Before moving into development, a thorough review of relevant regulatory and compliance standards shall be conducted. This review shall ensure that all project components align with critical standards such as GIGW 3.0, W3C, and WCAG 2.2. A gap analysis shall be performed

to identify any areas that may need attention during the design, development and STQC audit & certification stages.

10.3 Development with CMS

10.3.1 Enterprise-grade CMS Implementation

The development and integration stage shall begin with the implementation of the chosen enterprise-grade CMS. The CMS shall be installed and configured on the MEITY-approved VPC, ensuring it meets all security and compliance requirements.

10.3.2 Website Design and Development

Concurrent with the CMS implementation, the development of the PFRDA website shall begin. This process shall follow the approved design blueprint, incorporating new features, functionalities, to enhance user interaction and accessibility. The development team shall work iteratively, ensuring that the website's design and functionality meet the project's objectives. The new website developed should run in parallel to the older version till PFRDA decides it to be replaced. A link of the new website should be available on the old Website till such time that PFRDA decides to take it down.

10.3.3 UI/UX Enhancement

As the website development progresses, the upgraded UI/UX components shall be developed and integrated into the main website. The design shall be subjected to iterative testing, where usability and user experience shall be continually refined. This process shall ensure that the final product is intuitive, engaging, and user-friendly for all stakeholders.

10.3.4 Data Migration

A critical component of the development phase shall be the execution of the data migration plan. This shall involve transferring existing data to the new system while ensuring the integrity and accuracy of the content. The migration process shall also include the de-duplication of links, pages, and documents to optimize content management and improve accessibility.

10.3.5 Security and Compliance Integration

Security and compliance shall be integrated into the development process to protect sensitive data and ensure regulatory adherence. Security features such as encryption, two-factor authentication, and secure data transmission shall be implemented, and preliminary compliance testing shall be conducted. This proactive approach shall ensure that the website and CMS are secure and compliant with all relevant standards.

10.4 Testing and Quality Assurance

10.4.1 Functional Testing

The testing and quality assurance phase shall begin with functional testing, where the CMS, website features, and integrations shall be rigorously tested to ensure they operate as intended and conform to RFP requirements. Any issues or bugs identified during this phase shall be promptly addressed by the development team to ensure the system's functionality meets project requirements.

10.4.2 UI/UX Testing

In parallel to functional testing, extensive UI/UX testing shall be conducted with representative user groups. This testing shall aim to validate the effectiveness of the user interface and overall user experience. Feedback from these sessions shall be gathered and used to make necessary adjustments, ensuring the final product is intuitive and user-friendly.

10.4.3 Security and Compliance Testing

Security testing shall be carried out to identify and mitigate any vulnerabilities within the system. This phase shall also include compliance testing to ensure that all components adhere to the relevant standards, such as GIGW 3.0, W3C, and WCAG 2.2.

10.4.4 Performance and Load Testing

Finally, performance and load testing shall be performed to evaluate how the website handles various traffic conditions. This testing shall help identify potential bottlenecks and optimize the system for speed, reliability, and scalability. Ensuring that the website performs well under load shall be critical for providing a seamless user experience.

10.5 Deployment

10.5.1 Final Review and Approval

Before deployment, a final review of the entire system shall be conducted with stakeholders to ensure that all requirements have been met. This review shall be crucial for obtaining formal approval to move forward with the deployment phase. Any last-minute adjustments shall be made to align the system with stakeholder expectations.

10.5.2 Production Environment Setup

With approval in hand, the production environment shall be set up on the MEITY-approved VPC. This environment shall be configured to meet all security and compliance standards, ensuring that the system is ready for live operation. The final version of the website and CMS shall then be migrated to this production environment, marking the transition from development to deployment.

10.5.3 Go-Live

The go-live phase shall officially launch the PFRDA website. During this phase, the system shall be closely monitored to identify and address any immediate issues that may arise. This careful monitoring shall ensure a smooth transition to the live environment and allow for a rapid response to any challenges.

10.6 Post-Launch Optimization and Support

10.6.1 Monitoring and Analytics

Following the go-live, monitoring tools shall be implemented to track website performance, user engagement, and system health. The data collected from these tools shall be analysed to identify areas for further optimization. The selected bidder shall provide reports on website performance to PFRDA as and when requested, enabling PFRDA to make informed decisions to improve system performance and enhance user satisfaction. Full-fledged enterprise grade APM should be a part for the offering from bidder for monitoring performance & SLA.

10.6.2 User Training and Support

To ensure that PFRDA can effectively manage and use the new system, comprehensive training sessions shall be provided. These sessions shall cover CMS usage, content management, and system administration. Additionally, a support system shall be established to address any user queries or technical issues that may arise post-launch. Video & PDF version of training materials to be provided by the SI that can be used for PFRDA's inhouse LMS (Moodle). Training Materials should be updated by the SI throughout the project tenure.

10.6.3 Setup Technical Helpdesk

A technical helpdesk shall be setup by SI from the date of go-live via email and dedicated telephone (with Interactive Voice Response (IVR) narrating wait time & cue number, Call detail record (CDR), feedback SMS, Communication SMS. The helpdesk should be operated via a CRM where ticketing is used for every event. Reports are created as per PFRDA need. Incident Management/Ticketing tools will be provided by SI for handling issues, requests, concerns raised by PFRDA users during entire project duration.

10.6.4 Facility Management

1. In addition to the helpdesk, one resource from SI will be stationed at PFRDA premises from the date of go-live till completion of the warranty & stabilization period.
2. Facility management resource shall be available from 9.30 am to 6.00 pm, from Monday to Friday (all working days) , for the tasks given below:
 - a. Assist PFRDA employees in case any support is needed for using the website and its functionalities.

- b. Work together with PFRDA employees to gather inputs for any issues in the application faced by the users and communicate the same to bidder's offshore team.
- c. Provide solution demonstrations as needed, gather requirements for potential future enhancements, and perform any other tasks related to the proposed solution.
3. During the Stabilization & Warranty or AMC period, if the scope of work diversifies and requires specialized skills beyond those of the current team, the SI shall arrange to supply the necessary skilled personnel to PFRDA at no additional cost.
4. In case the resource provided by the SI is not available, a replacement resource shall be provided by the SI immediately. If there is delay in providing replacement resource, PFRDA may invoke compensation as mentioned in SLA and LDs/Compensation - [Appendix-IV](#) of this RFP.

10.7 Annual Management Contract Support

The Annual Maintenance Contract (AMC) provides ongoing support and maintenance for the PFRDA website beyond the warranty & stabilization period. The AMC defines the terms under which the System Integrator (SI) will deliver updates, bug fixes, feature enhancements, and technical support, ensuring the continued functionality, performance, and security of the website. The scope of services under the AMC includes, but is not limited to, the following:

1. **Bug Identification and Resolution:** Employ monitoring tools and gather user feedback to identify and classify software issues. Establish a structured process for tracking, prioritizing, and resolving reported defects. Collaborate with the development team to resolve critical issues in a timely manner, ensuring fixes are thoroughly tested to avoid introducing new problems.
2. **Performance Monitoring and Optimization:** Implement comprehensive performance monitoring solutions to proactively detect bottlenecks and performance issues. Conduct regular performance audits to identify areas for improvement. Optimize code, database queries, and configurations for optimal system performance. Plan capacity upgrades and scalability improvements as needed. Compatibility updates to ensure the software remains compatible with evolving technologies and platforms.
3. Provide ongoing technical support to assist users encountering issues while using the website.
4. **Data Backup and Recovery Management:** Establish automated backup procedures for website data and configurations. Regularly test recovery processes to ensure reliable data restoration. Develop and maintain a comprehensive disaster recovery plan, including off-site backups and failover systems.
5. **Documentation Management:** Ensure that all documentation, including changes, fixes, and enhancements, is updated and well-organized. Maintain accurate user manuals, technical guides, and self-help resources.
6. **Change Management and Request Handling:** Implement a formal change management process to assess, prioritize, and execute change requests or feature

- enhancements. Ensure that changes are thoroughly tested for system stability, security, and performance.
7. **License and Compliance Oversight:** Maintain records of software licenses, ensure compliance with licensing agreements, and manage renewals. Ensure the website complies with industry regulations and standards.
 8. **Reporting and Analytics:** Generate regular reports on system performance, support tickets, and SLA compliance. Use analytics to identify patterns and trends, providing insights for continuous improvement. Share reports with PFRDA stakeholders to inform decision-making.
 9. **Project Communication and Review Meetings:** Maintain clear and ongoing communication with PFRDA. Conduct regular review meetings to discuss system status, performance, and any upcoming maintenance activities. Address PFRDA's concerns and expectations promptly.
 10. **Service Level Agreement (SLA) Adherence:** Adhere to the SLAs outlined in the maintenance contract, ensuring timely responses, resolution of issues, and system availability. Continuously monitor and report on SLA compliance.
 11. **Proactive Maintenance and Preventive Measures:** Develop and implement proactive maintenance plans to prevent potential issues before they impact system performance. Conduct routine system health checks, security scans, and vulnerability assessments.
 12. **Cost Management and Budgeting:** Maintain a transparent budget for maintenance activities, including software licenses, support contracts, personnel, and infrastructure expenses.
 13. **Continuous Improvement Initiatives:** Promote a culture of continuous improvement by soliciting feedback from users and stakeholders. Implement system optimizations and process improvements based on operational experience and lessons learned.
 14. **Ongoing Maintenance and Updates:** Ensure continuous maintenance, support, and updates beyond the warranty period to keep the website functioning optimally and relevant over time.
 15. **Data Recovery and Restoration:** The SI is responsible for the recovery of lost data and the repair of damaged data. Any errors or issues impacting data integrity must be corrected swiftly.
 16. **Backup and Restore Policy:** Provide a detailed backup and restore policy for the website database and update the policy following system or database upgrades.
 17. **Security Documentation:** Develop and provide documentation outlining comprehensive security features at both the system and database levels to ensure data security and integrity.
 18. **Audit and Compliance:** Ensure audit trails and including user activity, timestamps, and details of changes to the system, files, and databases. Regular audits must be performed to ensure compliance with PFRDA's security and operational guidelines.
 19. **End-to-End Security:** The solution must be designed with comprehensive security measures, including end-to-end encryption, data masking, and compliance with the

latest security standards. All security requirements must be embedded into the design of the application, database, and overall system architecture.

10.8 Project Closure

10.8.1 Final Documentation

As the project nears completion, final documentation shall be prepared and submitted. This documentation shall include the project completion report, user manuals, and system documentation, providing a comprehensive record of the project and its outcomes. These documents shall serve as valuable resources for future reference and ongoing system management.

10.8.2 Handover and Transition

1. As the project nears completion, PFRDA may plan to release fresh RFP for hiring services of new SI or may extend the services of current SI on the same terms & conditions of existing contract. In case of selection of new SI before the expiry of the current agreement, it is expected that the current successful bidder will ensure the smooth transition to the new SI and shall co-operate with PFRDA, as required in order to fulfil the obligations.
2. The selected bidder shall comply with all reasonable requests by PFRDA to provide information relating to the operation of the Services, including but not limited to, services and software used, inter-working, coordinating with other application owners, access to and provision of all performance reports, agreed procedures, and any other relevant information (including the configurations set up for PFRDA and procedures used by selected bidder for handling Data) reasonably necessary to achieve an effective transition.
3. The exit of the current successful bidder and closure of the project will be as per the exit management clause of the MSA ([Appendix VI](#), Clause 19).

11. Minimum Qualifications and Experience for Key Resources

- 11.1 The following are indicative minimum qualifications and experience for key resources required to implement the end-to-end CMS solution for PFRDA- Connect. Resources which are considered for technical bid evaluation shall be construed as 'Key Personnel' including but not limited to members involved in the following - Planning, Analysis, Requirement Gathering, Design, Solution consulting, Database Architecture, Configuration, Customization, Integration, Installation, Setup & Go-live of the solution.

| Sl. No | Role & Qualification | Experience & JD |
|--------|---|--|
| 1. | <p>Project Manager <u>Desired Qualifications:</u> B.E/B.Tech/BSc/MCA/MSc/MBA (Comp Science/IT) or any other related technical qualifications/certifications from reputed institutes in the field would be desirable. Certification of the proposed CMS solution will be preferable</p> | <ul style="list-style-type: none"> • 10+ years of experience in Project Management preferably for Government Sector / PSU / PSE / Banking / Financial Institutions / Insurance related project – websites. • PMP or equivalent certification will be preferred, with experience of taking care of the functional as well as the technical side of the project. • Responsible for planning, directing, and coordinating the overall program effort. • Should be competent in Project Monitoring and Control, Software development methodologies and Technology Knowhow. • Continuously be in touch with PFRDA project teams and update PFRDA stakeholders weekly on the status of the project. |
| 2. | <p>Lead Business Analyst <u>Desired Qualifications:</u> B.E/B.Tech/BSc/MCA/MSc/MBA (Comp Science/IT) or any other related technical qualifications/certifications from reputed institutes in the field would be desirable. Certification of the proposed CMS solution will be preferable</p> | <ul style="list-style-type: none"> • 5+ years of hands-on experience working on the proposed CMS solutions preferably for Government Sector / PSU / PSE / Banking / Financial Institutions/Insurance related project – websites. • Must have extensive experience in planning, analysis, requirement gathering and creating artifacts like BRD, FRD, SRS, Use cases, UML diagrams, Wireframes, Prototypes etc. |
| 3. | <p>UI/UX Lead <u>Desired Qualifications:</u> B.E/B.Tech/BSc/MCA/MSc/ (Comp Science/IT) or any other related Technical or Design related qualifications/ certifications from reputed institutes in the field would be desirable</p> | <ul style="list-style-type: none"> • 5+ years of experience in analysing and implementing UX Frameworks to devise the most suitable experience strategy for the public facing website. • Must have solid grasp of UI/UX methodologies / processes / guidelines, User Centred Design (UCD) concepts, planning and conducting user research, user journeys, revamping / enhancing existing information architecture, user testing, A/B testing, |

| Sl. No | Role & Qualification | Experience & JD |
|--------|---|--|
| | | wireframing, prototyping, heuristic evaluation, usability testing (Formative & Summative), UX writing, proposed Analytics, Design and prototyping tools, and accessibility concerns for the various facets of the project. |
| 4. | <p>Solution Architect <u>Desired Qualifications:</u> B.E/B.Tech/BSc/MCA/MSc (Comp Science/IT) or any other related technical qualifications/certifications. Certification in relevant architectural frameworks (e.g., TOGAF, AWS/GCP/Azure Solutions Architect) is preferable.</p> | <ul style="list-style-type: none"> • 10+ years of experience in solution architecture, preferably for Government/PSU/Banking/Financial sectors. • Strong expertise in designing complex systems, with hands-on experience in architecture frameworks like TOGAF or similar. • In-depth knowledge of cloud architecture and API integrations. • Ability to create high-level architecture diagrams, technical specifications, and ensure solutions align with enterprise standards. • Extensive experience collaborating with project stakeholders, technical teams, and business units to deliver end-to-end solutions. |

| Sl. No | Role & Qualification | Experience & JD |
|--------|--|--|
| 5. | <p>OEM: Solution Consultant / Expert <u>Desired Qualifications:</u> B.E/B.Tech/BSc/MCA/MSc (Comp Science/IT) or any other related technical qualifications / certifications from reputed institutes in the field would be desirable. Certification of the proposed CMS solution is desirable.</p> | <ul style="list-style-type: none"> • 10+ Years of Experience on the proposed CMS solution preferably for Government Sector / PSU / PSE / Banking / Financial Institutions / Insurance related project – websites. • Responsible for advising/consulting PFRDA, as well as the SI for optimum utilisation of the proposed CMS platform and services. • Ensure that SI has adhered and complied to all the guidelines mandated by PFRDA as well as OEM for implementation of proposed CMS solution. • Review design documentation, technical architecture, validations, software development best practises including sample code reviews, non-production environment deployment reviews, Production Environment audits, Performance review etc. |
| 6. | <p>Cloud Specialist <u>Desired Qualifications:</u> B.E/B.Tech/BSc/MCA/MSc (Comp Science/IT) or any related technical qualifications. Cloud certifications (AWS, Azure, Google Cloud, etc.) are highly desirable.</p> | <ul style="list-style-type: none"> • 5+ years of experience in designing, deploying, and maintaining cloud-based infrastructure in AWS/Azure/GCP environments. • Expertise in cloud architecture, network architecture, and cloud security practices. • Strong hands-on experience in setting up CI/CD pipelines, Infrastructure as Code (Terraform, CloudFormation), and automation tools. • Proficient in cloud monitoring, scaling, and high-availability strategies. • Experience with cloud setups and managing migrations from on-premises VPC to another cloud environment. |
| 7. | <p>Tech Lead / Project Lead <u>Desired Qualifications:</u> B.E/B.Tech/BSc/MCA/MSc (Comp Science/IT) or any other related</p> | <ul style="list-style-type: none"> • 8+ years of hands-on experience in implementation/integration of the proposed CMS solution for similar |

| Sl. No | Role & Qualification | Experience & JD |
|--------|---|---|
| | technical qualifications/certifications from reputed institutes in the field would be desirable. Certification of the proposed CMS solution will be preferable | <p>nature and level of public facing website.</p> <ul style="list-style-type: none"> • Extensive experience on Design and Development, review the Code developed by Developers and further help in optimisation and enhancement. • Provide adherence and compliance to the implementation/integration/security guidelines mandated by OEM for the proposed CMS solution. |
| 8. | <p>SEO Specialist <u>Desired Qualifications:</u> bachelor's degree in computer science/IT or any other related technical qualifications/certifications from reputed institutes in the field would be desirable</p> | <ul style="list-style-type: none"> • 3+ Years of experience as a SEO expert with extensive experience in keywords research, traffic & metrics analysis, optimizing website's ranking in accordance with search engines requirements and coordinating with content writers and designers. • Extensive experience working on the proposed on-premises Analytics tool and website optimization techniques. |
| 9. | <p>Cyber Security Expert <u>Desired Qualifications:</u> B.E/B.Tech/BSc/MCA/MSc (Comp Science/IT) or relevant technical qualifications. Certifications like CISSP, CEH, or CISA would be an added advantage.</p> | <ul style="list-style-type: none"> • 7+ years of experience in cybersecurity practices, with a strong focus on government/PSU/Banking/Financial sector projects. • Expertise in security assessments, vulnerability testing, and ethical hacking. • Hands-on experience with SIEM tools, intrusion detection/prevention systems, and incident response. • Knowledge of security protocols and encryption technologies. • Familiarity with GDPR, IT Act, and other regulations governing data security. |
| 10. | <p>Lead QA <u>Desired Qualifications:</u> B.E/B.Tech/BSc/MCA/MSc (Comp Science/IT) or any other related technical qualifications/certifications</p> | <ul style="list-style-type: none"> • 3+ years of hands-on experience on both manual & automation testing of the Website and the proposed CMS solution. |

| Sl. No | Role & Qualification | Experience & JD |
|--------|---|--|
| | from reputed institutes in the field would be desirable. Certification of the proposed CMS solution will be preferable | <ul style="list-style-type: none"> • Creation of functional, non-functional test cases and designing & executing automation test scripts for website. • Perform Load Testing & Stress Testing at Application as well as Infrastructure level Reporting. • Documenting technical issue and check compliance of the UI. |
| 11. | <p>Operations & Maintenance (O&M) Lead</p> <p><u>Desired Qualifications:</u> B.E/B.Tech/BSc/MCA/MSc (Comp Science/IT) or related technical field. Certifications in ITIL or any operations management-related qualifications are preferable.</p> | <ul style="list-style-type: none"> • 8+ years of experience managing operations and maintenance for IT systems, preferably in the Government/PSU/Banking/Financial sectors. • Expertise in ITIL framework, service desk management, SLAs, and problem resolution. • Proven experience in overseeing the O&M of enterprise-level systems, ensuring their smooth functioning, troubleshooting, and timely upgrades. • Strong leadership skills to manage technical teams, field engineers, and support staff for regular system checks and troubleshooting. • Experience in vendor coordination, technical documentation, and performance reporting. • Resource may need to travel to client sites for onsite O&M supervision and team coordination. |
| 12. | <p>Content Writer</p> <p><u>Desired Qualifications:</u> Bachelor's or Master's degree in English, Journalism, Communication, or IT-related fields. Certifications in content creation, technical writing, or SEO would be an advantage.</p> | <ul style="list-style-type: none"> • 3+ years of experience in writing content for websites, blogs, product descriptions, or technical documentation. • Ability to create clear, concise, and engaging content aligned with user requirements and SEO best practices. • Experience collaborating with UI/UX designers, SEO specialists, and developers to align content with design and technical guidelines. • Proficient in using content management systems (CMS) and online publishing platforms. |

| Sl. No | Role & Qualification | Experience & JD |
|--------|----------------------|--|
| | | <ul style="list-style-type: none"> • Strong skills in research, keyword optimization, and tailoring content to different target audiences. • Resource may be expected to work closely with cross-functional teams, attend workshops, and create content strategies based on project needs. |

11.2 The key manpower should be same at the time of project implementation as proposed in bidder's technical proposal. If, due to unforeseen circumstances, there are changes in manpower during project tenure, the bidder must ensure that any newly proposed key personnel possess equal or greater relevant experience and qualification. In case any manpower is not performing as per the satisfaction of PFRDA, the bidder shall replace the concerned manpower to the satisfaction of PFRDA.

11.3 If there is a delay in replacement of any resource already approved by PFRDA, then SI shall pay compensation as per Clause 43.

12. Payment terms

- 12.1. Payment will be made on successful completion of Milestone to the satisfaction of PFRDA as defined at [Annexure-IX](#), upon submission of Invoice from SI and approval of PFRDA on the same.
- 12.2. Any delay in achievement of milestones/deliverables/activities from SI shall automatically result in delay of corresponding payment from PFRDA without any additional liability on PFRDA.
- 12.3. Any objection/dispute/clarification to the amounts invoiced in the bill will be raised by PFRDA within reasonable time from the date of receipt of the invoice. Upon settlement of disputes with respect to any disputed invoice(s), PFRDA will make payment within thirty (30) working days of the settlement of such disputes.
- 12.4. Terms of payment indicated in the Contract that will be signed between PFRDA and SI will be final and binding on SI and no interest will be payable by PFRDA on outstanding amounts under any circumstances, if there are any clauses in the Invoice contrary to the terms of the Contract.

13. Project Schedule and Milestones

Please refer [SCHEDULE I](#) for project schedule and milestones.

14. Taxes and duties

- 14.1. Prices quoted should be exclusive of GST but inclusive of all other taxes/duties/levies as also cost of incidental services such as transportation, road

- permits, insurance etc. Bidders shall include all such taxes as part of their financial proposal.
- 14.2. PFRDA shall not be liable to pay any other taxes/levies/duties except for GST for invoices in the name of PFRDA. The total price quoted by bidder exclusive of GST as applicable will be considered for financial bid evaluation. Any new levies or taxes after award of contract shall be borne by party to whom contract has been awarded.
 - 14.3. All expenses, stamp duty and other charges/expenses in Connection with the execution of the Agreement arising out of this RFP process shall be borne by the SI.
 - 14.4. Wherever the laws and regulations require deduction of such taxes at the source of payment, PFRDA shall make such deductions from the payment due to the SI. The remittance of amounts so deducted and issuance of certificate for such deductions shall be made by PFRDA as per the laws and regulations for the time being in force. Nothing in the Contract shall relieve SI from his responsibility to pay any tax that may be levied on income and profits made by SI in respect of this Contract.

15. Eligibility Criteria

- 15.1 Bid is open to all interested Bidders who meet the eligibility criteria as given in [Annexure-V](#). The eligibility conditions must be satisfied on the date of submission of respective bids.
- 15.2 During evaluation and comparison of Bids, PFRDA may, at its discretion, ask bidders for clarification on the Bids received. The request for clarification shall be in writing and no change in Financials or substance of the Bid shall be sought, offered, or permitted. No clarification at the initiative of bidder shall be entertained after the bid submission date. No conditional bid shall be accepted from any bidder.

16. Technical Evaluation Criteria

- 16.1 Bids will be evaluated by the Quality cum Cost Based Selection (QCBS) method.
- 16.2 Eligible bidders to be technically evaluated as per the Technical Evaluation criteria given at [Annexure-VI](#) of this document. Bidder must submit the documents substantiating eligibility and Technical Evaluation criteria as mentioned in this RFP document.
- 16.3 Technical evaluation will include technical information, demonstration of proposed Technology Solution/services, reference calls and site visits, wherever required. Bidders may highlight the noteworthy/superior features of their Technology Solution/services. Bidder to demonstrate/substantiate all claims made in the technical Bid along with supporting documents to PFRDA.
- 16.4 Bidders who qualify the eligibility criteria, will be called for an in-person presentation of the solution (led by the Key Personnel mentioned in the technical bid document) that must include Solution Approach, Solution architecture, proposed benefit and how it meets PFRDA's project objectives, implementation methodology, project management approach, cloud deployment methodologies, etc, including a

product walkthrough/demo. This should include both Functional and Non-Functional approaches.

17. Financial Evaluation Criteria

- 17.1 Bidders to submit financial bid in the prescribed format as given at [Annexure- VIII](#).
- 17.2 Bidders who score 70 or more out of 100 marks in the technical evaluation will be declared as Technically qualified. Financial bids of only technically qualified bidders will be opened.

An illustration for the process of Combined Technical–Financial Evaluation process is given below:

In respect of all the technically qualified bidders, in whose case, the financial bid has been opened; a combined techno-financial evaluation will be done by PFRDA as per the following procedure:

1. Technical score will be arrived at treating the marks of bidder scoring the highest marks (A) in technical evaluation as 100. Technical score for other bidders (B, C etc.) will be computed using the formula, $T = \text{Marks of B} / \text{Marks of highest scorer A} * 100$.
2. Similarly, financial score of all technically qualified bidders will be arrived at taking the cost quoted by lowest bidder i.e., the lowest quote from all technically qualified bidders (say F) as 100. Marks for other bidders will be calculated using the formula $\text{Combined Score} = \text{Cost of lowest bidder (F)} / \text{Cost quoted by bidder} * 100$.
3. A “Combined Score” will be arrived at, considering both marks scored through technical bid evaluation and the financial quotes with a weight age of 70% for technical and 30% for financials as detailed below.
4. Then combined score is arrived at by adding Technical Score and Financial Score. The successful bidder will be the one who has the highest Combined Score (H1), up to 2 decimals.

Formula for calculating the Combined Score of technically qualified bidder is as follows:

$$H = (T/T \text{ High} \times 70) + (F \text{ Low}/F \times 30)$$

Whereas: H = Combined Score

T=Technical Score; T High = Highest Technical Score among bidders

F=Financial Quote; F Low = Lowest financial quote of F among bidders

Example:

| Bidder | Technical Evaluation Marks (T) | Nominal Bid Price in INR (F) | Technical Score | Commercial Score | Combined Score (out of 100) |
|--------|--------------------------------|------------------------------|------------------|------------------|-----------------------------|
| A | 95 | 71 | $95/95*70=70.00$ | $60/71*30=25.35$ | $70.0+25.35=95.35$ (H-1) |
| B | 85 | 65 | $85/95*70=62.63$ | $60/65*30=27.69$ | $62.63+27.69=90.32$ (H-2) |
| F | 80 | 60 | $80/95*70=58.94$ | $60/60*30=30.00$ | $58.94+30=88.94$ (H-3) |

In the above example, Bidder A with highest score (H1) becomes the successful Bidder. In case of a tie between bidders i.e., if two or more bidders receive the same combined score, bidder with the higher technical score shall be declared as (H1).

18. Award of contract

- 18.1 Award of contract to the Bid scoring highest marks based on QCBS method (Quality and Cost Based Selection) combining score of bids giving weightage of Seventy – Thirty (70:30) for technical and financial scores, respectively.
- 18.2 Up to two decimal points (rounding off) will be taken in the final score. If two or more bidders receive the same combined score, bidder with the higher technical score shall be declared as (H1).
- 18.3 Bidder with highest score (H1) becomes the successful Bidder. In case of a tie between bidders i.e., if two or more bidders receive the same combined score, bidder with the higher technical score shall be declared as (H1).
- 18.4 PFRDA will notify ‘Selected Bidder/Awardee/SI’ in writing by way of issuance of Letter of Intent (LOI) that its Bid has been accepted. SI must return the duplicate copy of the same to PFRDA within Ten (10) working days, duly Accepted, Stamped and Signed by Authorised Signatory of the SI as acknowledgement/acceptance.
- 18.5 The successful Bidder will have to execute a Non-Disclosure Agreement (NDA) as per [Appendix-V](#), Performance Security/Performance Security for the amount and validity as desired in this RFP on the lines of indicative format given in [Appendix-II](#) of this RFP before signing of the Master Service Agreement. The NDA shall be valid even post contract completion up to 180 days.
- 18.6 The successful Bidder shall be required to enter into a Contract with PFRDA. Copy of Board resolution and power of attorney (POA wherever applicable) showing that Signatory has been duly authorized to sign the acceptance letter, contract and NDA should be submitted to PFRDA before hand.
- 18.7 PFRDA reserves the right to stipulate, at the time of finalization of the Contract, any other document(s) to be enclosed as a part of the final Contract including any other terms to secure the satisfactory and timely performance of the project.

- 18.8 Failure of the successful Bidder to comply with the requirements/terms and conditions of this RFP shall constitute sufficient grounds for the annulment of the award and forfeiture of the EMD and/or Performance Security.

19. Clarification and Amendments on RFP/Pre-bid meeting

- 19.1 Any Bidder requiring clarification on RFP may notify PFRDA in writing strictly as per the format given in [Annexure-IV](#) at the email address within the date/time mentioned in the Schedule of Events.
- 19.2 A pre-Bid meeting will be held in person or online or in both mode on the date and time specified in the Schedule of Events which may be attended by the authorized representatives of interested bidders.
- 19.3 The queries received (without identifying source of query) and response of PFRDA thereof will be posted on PFRDA's website or conveyed to bidders.
- 19.4 PFRDA reserves the right to amend, rescind or reissue the RFP, at any time prior to the deadline for submission of Bids. PFRDA, for any reason, whether, on its own initiative or in response to a clarification requested by a prospective Bidder, may modify the RFP, by amendment which will be made available to bidders by way of corrigendum/addendum. PFRDA may also rescind the whole process at any time prior to award of contract, based on its requirement and no bidders shall have any right to dispute the action taken by PFRDA nor PFRDA shall reimburse any costs etc. to any bidder.
- 19.5 The interested parties/bidders are advised to check PFRDA's website regularly till the date of submission of Bid document specified in the *Schedule of Events/email* and ensure that clarifications/amendments issued by PFRDA, if any, have been taken into consideration before submitting the Bid. Such amendments/clarifications, if any, issued by PFRDA will be binding on the participating Bidders. PFRDA will not take any responsibility for any such omissions by bidder. PFRDA, at its own discretion, may extend the deadline for submission of Bids in order to allow prospective Bidders a reasonable time to prepare the Bid, for taking the amendment into account.
- 19.6 No request for change in Financial/legal terms and conditions, other than what has been mentioned in this RFP or any addenda/corrigenda or clarifications issued in Connection thereto, will be entertained and queries in this regard, therefore will not be entertained.
- 19.7 Queries received after the scheduled date and time will not be responded/acted upon.

20. Contents of Bid document

- 20.1 The Bid prepared by bidder, as well as all correspondences and documents relating to the Bid exchanged by bidder and supporting documents and printed literature shall be submitted in English.

- 20.2 The information provided by bidders in response to this RFP will become the property of PFRDA and will not be returned. Incomplete information in the Bid document may lead to non-consideration of the proposal.

21. Powers to vary or omit work

In any case in which the successful Bidder has received instructions from PFRDA as to the requirements for carrying out the altered or additional substituted work which either then or later, will in the opinion of the SI, involve a claim for additional payments, such additional payments shall be in line with Change request rates and mutually agreed with the terms and conditions of the order.

22. Bid Processing Fee

Bidders to submit Bid Processing Fee (INR 25,000 i.e., Rupees Twenty-Five Thousand Only) plus GST @ 18% i.e. Rs. 4,500/- (Total of Rs. 29,500). Bidders shall transfer the aforementioned amount through electronic transfer in the designated bank account of PFRDA or in the form of Account payee demand draft in favour of PFRDA, New Delhi. Details of bank account is given in table of [Schedule of Events](#).

Note: Bidders who have had expressed interest against EOI for TARCH project Ref no.: PFRDA/2022-23/IT/02 issued on 27 June 2022 and not submitted bid for RFP ref. no.: PFRDA/2023/TARCH/PINTRA/01 (issued on 4th July 2023) and for RFP ref. no.:PFRDA/2024/TARCH/PFRDA-TRACE/01 (issued on 31st January 2024) are exempted from submitting Bid Processing fee.

23. Earnest Money deposit (EMD)

- 23.1 Bidder shall furnish EMD for the amount and validity period mentioned in the Schedule of Events of this RFP.
- 23.2 EMD should be submitted by the bidders in the form of a Performance Bank Guarantee (BG) issued by a Scheduled Commercial bank lien marked in favour of PFRDA in the designated bank account of PFRDA. The EMD submitted in the form of bank guarantee should be valid up to at least 180 days from the bid submission end date.
- 23.3 Any Bid not accompanied by EMD for the specified amount and not submitted to PFRDA as mentioned in this RFP will be rejected as non- responsive.
- 23.4 The EMD of the unsuccessful Bidder(s) will be discharged and returned within one month of notification of award to the successful Bidder.
- 23.5 The EMD of the successful Bidder will be discharged upon bidder signing the Contract and furnishing the Performance Security for the amount and validity as mentioned in this RFP.

Note:- The EMD format outlined as [Appendix - I](#) shall be considered as indicative, and PFRDA reserves the right to accept EMD presented in accordance with the format,

without prejudice to the accuracy and completeness of the information contained therein.

23.6 The EMD may be forfeited:

- a. if a Bidder withdraws or modify the submitted Bid during the period of Bid validity specified in this RFP; or
- b. if a Bidder makes any statement or encloses any form which turns out to be false/incorrect at any time prior to signing of Contract; or
- c. if the successful Bidder fails to accept Letter of Intent and/or sign the Contract with PFRDA or furnish Performance Security, within the specified period in the RFP.

23.7 If EMD is forfeited for any reasons mentioned above, the concerned Bidder may be debarred from participating in the RFPs floated by PFRDA, in future for a period of three (03) years, as per sole discretion of PFRDA.

23.8 No interest would be paid by PFRDA on EMD or Performance Security received in the account of PFRDA, under any circumstances.

23.9 Micro and Small Enterprises (MSEs) as defined in MSE Procurement Policy issued by Department of Micro, Small and Medium Enterprises (MSMEs) or are registered with the Central Purchase Organization or the concerned Ministry or Department or Start-ups as recognized by Department of Industrial Policy & Promotion (DIPP) are exempted from submission of EMD.

24. Bid Preparation and Submission

24.1 Bid Preparation

The Bid prepared by the bidders shall comprise the following components:

1. Technical Bid – Technical Bid shall comprise of:
 - a. EMD and Bid Processing fee in Original/Receipt
 - b. Integrity Pact signed and stamped by Authorized Signatory
 - c. Technical bid: Include copies of required documents along with required information as outlined in Eligibility and Technical Evaluation Parameters in this RFP and fulfils all the technical conditions of this document.
2. Financial Bid – Financial Bid as per the prescribed format as per [Annexure-VIII](#).

Note: Each page of all the documents submitted by bidder shall be signed by the authorized signatory and shall also put company's/authorized signatory' seal. Bidder's authorization shall be supported by attaching a scanned copy of valid proof of authorization like Power of Attorney/Board Resolution etc. binding the bidding entity.

24.2 Bid Submission

1. Bids must be properly secured and sealed. Bidders shall submit the complete Technical Bid. In addition, bidders shall also sign and stamp each page of Technical and

- Financial bid, as confirmation of their acceptance to the terms and conditions contained therein. Further, bidders shall also sign with date and affix their seal of this RFP document and submit the same as part of technical bid.
2. Technical bid to be submitted in a separate envelope clearly marked “Technical Bid” with all relevant documents. Checklist for the documents to be submitted is provided at [Annexure-XII](#).
 3. Care should be taken that the Technical Bid shall not contain any financial information. Such proposal, if received, will be rejected.
 4. Financial Bid shall contain the pricing terms strictly in the prescribed format as per [Annexure-VIII](#) to be submitted in a separate sealed envelope clearly marked “Financial Bid”. The Price must include all the price components mentioned. Prices are to be quoted in Indian Rupees only.
 5. The Total Financial bid shall include all licenses, subscriptions, services, software, database etc. without any exceptions for the entire duration of the contract. PFRDA shall not be responsible for any extra expenditure or any out-of-pocket expenses in this regard, whatsoever.
 6. Bids must consist of the following envelopes:
 - a. **Envelope I** super-scribing on top of the cover as "Envelope I: Bid Processing fee and Earnest Money Deposit and will be comprising of:
 - i. **Bid processing fee** in the form of Account payee demand draft in favour of PFRDA, New Delhi. In case of online transfer, the receipt of the same to be submitted. Details of bank accounts are given in [Section 5 Schedule of Events](#) table.
 - ii. **Earnest Money Deposit (EMD)** in the form of a Bank Guarantee (BG) /Demand-draft issued by a Scheduled Commercial bank lien marked in favour of PFRDA in the designated bank account of PFRDA.
 - b. **Envelope II** super-scribing on top of the cover as “Envelope II: Integrity Pact in Original” and will be comprising of Integrity Pact (Appendix- III) in original, to be signed and submitted.
 - c. **Envelope III** super-scribing on top of the cover as " Technical Bid” and will be comprising of technical bid along with all requisite documents as part of technical bid including power of attorney/board resolution to the authorized signatory. The completed Technical Bid to be submitted as a softcopy in pen drive also.
 - d. **Envelope IV** will super-scribing on top of the cover as “Financial Bid, in a sealed cover comprising of Financial Bid
 7. All the above four envelopes must be enclosed in a main envelope and marked with the caption ‘**DO NOT OPEN-THIS ENVELOPE TO BE OPENED BY PFRDA ONLY**’ at the top with bid number and title to be submitted in the tender box provided for the purpose at the office of PFRDA addressed to,

**Sh. Sumit Kumar,
Chief General Manager,
In charge- PFRDA-Connect
Pension Fund Regulatory and Development Authority (PFRDA)
E-500, Tower E, 5th Floor, World Trade Centre, Nauroji Nagar,
New Delhi-110 029**

RFP Reference No: PFRDA/2024/TARCH/PFRDA-Connect/01

Bid Title: “REQUEST FOR PROPOSAL FOR SELECTION OF SYSTEM INTEGRATOR (SI) FOR DESIGN, DEVELOPMENT, IMPLEMENTATION AND MAINTENANCE OF PFRDA WEBSITE (PFRDA-Connect)

8. All inner and outer envelopes shall also indicate the name and address of bidder to enable the Bid to be returned unopened in case it is declared “late” i.e. received after due date and time. Once the Bid submission date and time is over, bidders cannot submit their Bid. Such bids will be declared ‘late’ bids and will be summarily rejected.
9. If the outer envelope is not sealed or marked, PFRDA will assume no responsibility for the same and such Bids will be summarily rejected.
10. The Bid document shall be complete in accordance with various clauses of the RFP document, or any addenda/corrigenda or clarifications issued in Connection thereto, duly signed by the authorized representative of bidder. Document for authorizing representative to Bid and is to be attached.
11. Bid not accompanying the specified Bid processing fee shall be summarily rejected.
12. If EMD is not submitted in accordance with the specified mentioned amount or is not in order otherwise, the submitted bid shall be summarily rejected except for Micro and Small Enterprises (MSEs) as defined in MSE Procurement Policy issued by Department of Micro, Small and Medium Enterprises (MSMEs) or are registered with the Central Purchase Organization or the concerned Ministry or Department or Start-ups as recognized by Department of Industrial Policy & Promotion (DIPP).
13. If a bidder quotes NIL charges/consideration or quotes unrealistically low bid, the bid shall be treated as unresponsive and will not be considered.
14. If deemed necessary, PFRDA may seek clarifications on any aspect from bidder. However, that would not entitle bidder to change or cause any change in the substances of the Bid already submitted or the Financial quoted.
15. Bidders may also be asked to give presentation for the purpose of clarification of the Bid.
16. Bid received without signed Integrity pact will be summarily rejected.
17. Bidder must provide specific and factual replies to the points raised in the RFP.
18. The Bid shall be typed or written and shall be signed on each page by bidder or a person or persons duly authorized to bind bidder to the Contract.
19. All the enclosures (Bid submission) shall be serially numbered.
20. Bidder(s) should prepare and submit their Bids well in advance before the prescribed date and time to avoid any delay or problem during the bid submission process. PFRDA shall not be held responsible for any sort of delay, or the difficulties faced by bidder(s) during the submission of Bids.

21. PFRDA reserves the right to reject Bids not conforming to above.
22. PFRDA reserves the right to accept or reject any Bid in part or in full or to cancel the bidding process and reject all Bids at any time prior to contract award as specified in Award Criteria and Award of Contract, without incurring any liability to the affected Bidder or Bidders or any obligation to inform the affected Bidder.

25. Modification and withdrawal of Bids

- 25.1 Bidder may modify or withdraw its Bid after the Bid's submission, provided modification, including substitution or withdrawal of the Bids, is received prior to the deadline prescribed for submission of Bids. In case the bidder opts for withdrawal or any modification or substitution in the bid, the bidder shall intimate its intent in writing with the revised documents and submit the same with properly mentioning the "Revision/Substitution" or Withdrawal and submit the same within the time of submission of bid. The bidder will be allowed to withdraw/revise/substitute the document as intended and submitted within the timelines of original submission, as the case may be at the time of opening of bid.
- 25.2 No modification in the Bid shall be allowed, after the deadline for submission of Bids.
- 25.3 No Bid shall be withdrawn in the interval between the deadline for submission of Bids and the expiration of the period of Bid validity specified in this RFP. Withdrawal or modification of a Bid during this interval may result in the forfeiture of EMD submitted by bidder.

26. Period of Bid Validity

- 26.1 Bid shall remain valid for the duration of 180 days from Bid submission date.
- 26.2 In exceptional circumstances, PFRDA may solicit bidders' consent to an extension of the period of validity. The request and the responses thereto shall be made in writing. A Bidder is free to refuse the request. However, in such a case, PFRDA will not forfeit its EMD. However, any extension of validity of Bids or Financial will not entitle bidder to revise/modify the Bid document.

27. Bid Integrity

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

28. Bidding process/opening of technical bids

- 28.1 All the technical Bids duly received up to the specified time and date will be opened for initial evaluation on the time and date mentioned in the schedule of events. The envelopes containing the Bid Processing Fee, EMD and Integrity Pact will be opened in the presence of representatives of bidders who choose to attend the same. At the time of opening of these envelopes, it will also be ascertained whether the technical bid and financial bids have been submitted separately in the sealed envelopes. The representatives present will be required to sign the attendance sheet and also on the sealed financial bids conforming receipt of the same in sealed status from all bidders. Bids shall be opened at the scheduled time even if the representatives of all or any of bidders are not present.
- 28.2 In the first stage, only technical Bid will be opened and evaluated for eligibility criteria. Bids of such Bidders satisfying eligibility criteria and agree to comply with all the terms and conditions specified in the RFP will be evaluated for technical criteria.
- 28.3 Bidders scoring minimum 70 out of total 100 marks in technical evaluation shall be eligible for opening of financial bids.
- 28.4 PFRDA will form a bid opening cum evaluation committee to evaluate the bids and this committee will examine the Bids to determine whether they are complete, required formats have been furnished, the documents have been properly signed, processing fee, EMD for the desired amount and validity period is available and the Bids are in order. The committee may recommend to PFRDA and PFRDA may at its discretion waive any minor non-conformity or irregularity in a Bid which does not constitute a material deviation.

29. Contacting PFRDA

Any effort by a Bidder to influence members of the bid evaluation committee, PFRDA or its officials in its decisions on Bid evaluation and award of contract may result in the rejection of its Bid.

30. Consortium

As per scope of this RFP, consortium is not permitted. For clarification, consortium does not include collaboration with CSP & OEM for this project.

31. Subcontracting

As per scope of this RFP, subcontracting is strictly not permitted.

32. Services

- 32.1 All professional services necessary to successfully implement the proposed Software Solution will be part of the RFP/Contract.

- 32.2 SI should ensure that key personnel with relevant skill sets are available to always perform the contracted services.
- 32.3 SI should ensure that methodologies for delivering the services adhere to quality standards/timelines stipulated therefor.
- 32.4 SI shall provide and implement patches/upgrades/updates for software/Operating System/Middleware etc. as and when released by Service Provider/OEM or as per requirements of PFRDA. Whenever a new version update becomes available for a Major/Minor technology component (Example - database, development framework, CMS, etc), it is imperative for SI to notify the same to PFRDA within 2 weeks from the date of the release. This communication should be submitted with a recommendation proposal for version upgrade or otherwise. The proposal should be supported with an impact analysis report. The Change Control Board of the project will make the decision whether to retain the latest version, denoted as 'N', or the immediately preceding version, 'N-1', for production & other environments of the project. In no scenario the versions should be beyond 'N-1'. No software proposed for use shall be in an alpha or beta version or remain unreleased as of the bid proposal submission date. The same should be applicable from the date of going live in production.
- 32.5 SI shall provide legally valid Software Solution and keep PFRDA safe and harmless against any claim under IPR. The detailed information on license count and type of license shall also be provided to PFRDA.
- 32.6 SI shall keep PFRDA explicitly informed of the end of support dates on related products/services/firmware and should ensure support during warranty and AMC.

33. SLA and compensation/Liquidated damage

The compensation will be applicable as mentioned in [Appendix-IV](#) - SLA and Liquidated damages/Compensation of this RFP.

34. Right to Verification

- 34.1 PFRDA reserves the right to verify any or all the statements made by the bidders in the Bid document and to inspect bidder's facility, if necessary, to establish to its satisfaction about bidder's capacity/capabilities to perform the job.
- 34.2 PFRDA may visit/enquire and check the status from the past and current clients.

35. Right to Audit

- 35.1 SI shall be subject to audit by internal/external Auditors appointed by PFRDA with respect to the project. SI shall facilitate the same. PFRDA can make its expert assessment on the efficiency and effectiveness of the security, control, risk management, governance system and process created by SI. SI shall, whenever required by the Auditors, furnish all relevant information, records/data to them. Costs for such audit will be borne by PFRDA. PFRDA will provide reasonable notice not

less than seven (07) days to SI before such audit and same shall be conducted during normal business hours.

- 35.2 Where any deficiency has been observed during audit of SI on the risk parameters or in the certification submitted by the Auditors, SI shall correct/resolve the same at the earliest and shall provide all necessary documents related to resolution thereof and the auditor shall further certify in respect of resolution of the deficiencies. The resolution provided by SI shall require to be certified by the Auditors covering the respective risk parameters against which such deficiencies have been observed.
- 35.3 SI further agrees that whenever required by PFRDA, it will furnish all relevant information, records/data to such auditors and/or inspecting officials. PFRDA reserves the right to call for and/or retain any relevant information/audit reports on financial and security review with their findings undertaken by SI. However, SI shall not be obligated to provide records/data not related to Services under the Agreement (e.g., internal cost breakup etc.).

36. Validity of Agreement/Contract

The Agreement/SLA will be valid for the complete project duration as per the bifurcation given in Project Schedule.

37. Confidentiality

Service Provider shall treat all data and information of PFRDA as confidential, obtained in the process of executing its responsibilities, in strict confidence and will not reveal such information to any other party without prior written approval of PFRDA as explained under 'Non-Disclosure Agreement' in [Appendix-V](#) of this RFP.

38. Delay in SI's performance

- 38.1 Delivery, installation, commissioning of the Software Solution and performance of Services shall be made by SI within the timelines prescribed.
- 38.2 If at any time during performance of the Contract, SI encounter conditions impeding timely delivery of the Software Solution and performance of Services, SI shall promptly notify PFRDA in writing of the fact of the delay, its duration, and cause(s). As soon as practicable after receipt of SI's notice, PFRDA will evaluate situation and may, at its discretion, extend SI's time for performance, without their being any obligation to do so, in which case, the extension shall be ratified by the parties by amendment of the Contract.
- 38.3 Any delay in performing the obligation/defect in performance by SI may result in imposition of liquidated damages, compensation, invocation of Performance Security and/or termination of Contract (as laid down elsewhere in this RFP document) and as mentioned in the draft master service agreement.

39. Conflict of Interest

- 39.1 No entity registered as an Intermediary with PFRDA is allowed to participate in the bid process.
- 39.2 All bidders are required to disclose any actual or potential conflict of interest that may exist or arise during the course of the RFP process or any resulting contract. A conflict of interest arises when a bidder, its employees, or any of its associated entities have such a financial, personal, or other interest that could affect their impartiality or create an unfair advantage in this procurement process.
- 39.3 Bidders must promptly notify PFRDA of any such conflicts of interest. Failure to disclose conflicts of interest may result in disqualification from this RFP process or, if discovered after contract award, may lead to contract termination at the sole discretion of PFRDA.
- 39.4 PFRDA reserves the right to evaluate and address any conflicts of interest on a case-by-case basis and may request additional information or mitigation measures to ensure fairness, integrity, and transparency throughout the procurement process and the resulting contract.

40. Code of Integrity and Debarment

- 40.1 Bidders shall observe the highest standard of ethics/integrity during the bidding Process and in execution of the contract. Notwithstanding anything to the contrary contained herein, PFRDA shall reject Bid without being liable in any manner whatsoever to bidder if it determines that bidder was not eligible or has, directly or indirectly or through an agent, engaged in corrupt/fraudulent/coercive/undesirable or restrictive practices in the bidding Process.
- 40.2 Bidders are obliged under code of integrity to Suo-moto proactively declare any conflicts of interest (pre-existing or as and as soon as these arise at any stage) in RFP process and sign the Integrity pact as per [Appendix III](#).
- 40.3 Participation of Bidders and their eligibility to participate in PFRDA's procurement is subject to compliance with code of integrity and performance in contract as per terms and conditions of the contract. Debarment from participation in PFRDA's procurement process in future shall be considered:
 - a. If a Bidder is found to have directly or indirectly or through an agent, engaged or indulged in any corrupt/fraudulent/coercive/undesirable or restrictive practices during the bidding Process.
 - b. Bidder fails to abide by the terms and conditions or to maintain the required technical/operational staff/equipment or there is change in its production/service line affecting its performance adversely or fails to cooperate.
 - c. Other than in situations of force majeure, technically qualified bidder withdraws from the procurement process or after being declared as successful bidder: (i) withdraws from the process; (ii) fails to enter a Contract; or (iii) fails to provide

- performance guarantee or any other document or security required in terms of the RFP documents.
- d. If the Central Bureau of Investigation (CBI)/Central Vigilance Commission (CVC)/C&AG or Vigilance Department of PFRDA or any other investigating agency recommends such a course in respect of a case under investigation.
 - e. If there is strong justification for believing that the partners/directors/proprietor/agents of the firm/company have been guilty of violation of the code of integrity or Integrity Pact (wherever applicable), evasion or habitual default in payment of any tax levied by law; etc.
 - f. Any other reason as deemed suitable by PFRDA.

41. Cloud Hosting requirements on VPC

- 41.1 All the cloud related activities are the responsibility of SI as SI will be Single point of contact for PFRDA. The activities which are pertaining to CSP or MSP, SI will make sure that these activities will be performed as per standards like ITIL 4.0 framework. SI is expected to collaborate with Cloud Service Provider (CSP) and provide Virtual Private Cloud to PFRDA for hosting PFRDA-Connect for Five (05) years.
- 41.2 The total duration for the project will be of **Five (05) years** from the date of the award of the contract comprising of **One (01) month** of (Requirement Gathering, Project Plan development, Design and Architecture Blueprint), **Three (03) months** of development (Enterprise-grade CMS Implementation, Website Design and Development, UI/UX Enhancement, Data & Content Migration, Security and Compliance Integration), **Two (02) months** for testing & go-live (Functional Testing, UI/UX Testing, Security and Compliance Testing, Performance and Load Testing, Final Review and Approval, Production Environment Setup, Go-live), **Six (06) months** of warranty & stabilisation from the date of Go-live and AMC for **Forty-Eight (48) month** from the date of end of warranty. As described in the Eligibility criteria, the Cloud Service Provider (CSP) should be MEITY empanelled and STQC audit compliant.
- 41.3 SI should host PFRDA-Connect on MEITY empanelled cloud. SI and CSP need to make necessary provision for infrastructure, bandwidth scalability depending on the user load, security & network arrangements. Apart from the Production Environment, System Integrator shall maintain a pre-production (for the Staging, UAT & Development) environment.
- 41.4 SI shall list all tools to be used to develop, customize, and maintain the application, as well as the hosting platform, services and software & mention the same in [Annexure XV](#). SI shall be responsible for providing the Backup, Business Continuity Plan, Disaster recovery for the application and Disaster Recovery Operational Plan.
- 41.5 SI shall ensure that Cloud Service Provider should also consider data growth while and hence scalability of the PFRDA-Connect system in terms of compute, infrastructure Sizing (Hardware, network, bandwidth, firewall, webserver, application server, database server, IOPS, CPU, Memory, Storage) while submitting the bid.

- 41.6 SI shall ensure that CSP implement Enterprise Management Software (EMS) Tools/management & monitoring services - required for various reports like Average Response Time during peak usage hours, application uptime, database performance etc. at no extra cost to PFRDA.
- 41.7 SI should prepare and submit a detailed plan during execution of order with following details, but not limited to:
- a. Mapping of detailed services at primary site and DR site
 - VM Provisioning
 - Storage
 - Network interfaces
 - Network throughput
 - Backup
 - b. Detailed planning of services deployment and configuration:
 - Network architecture planning including
 - VLAN configuration planning
 - IP address planning
 - Subnet planning and routing planning if required.
 - Firewall configuration planning
 - Backup methodology
 - Failover mechanism for replication links
 - SI should also submit 'Cloud Port Out Plan' along with the approach & methodology of the proposed project.
- 41.8 On acceptance of the Implementation Plan as submitted in the technical proposal SI shall implement the cloud solution. PFRDA may verify the related components/tools/approaches as submitted in their technical proposal vis a vis implementation plan at any time of the project, if required.

42. Managed Services Requirements for Cloud

The below are managed services requirements for cloud management that should be performed by SI/CSP for this RFP. However, the SI will be overall responsible for performance under this contract.

42.1 Cloud Infrastructure Requirements

Below are the mandatory requirements for all cloud deployment models, but not limited to:

1. Virtual Machine Requirements

- a) The service shall be available online, on-demand and dynamically scalable up or down as per the requirements of this RFP

- b) Service shall provide auto-scalable, redundant, dynamic computing capabilities or virtual machines.
- c) Perform an Image backup of VM Image information or support the ability to take an existing running instance or a copy of an instance and export the instance into standard requisite format.
- d) In case of suspension of a running VM, the VM shall still be available for reactivation for a reasonable time without having to reinstall or reconfigure the VM for PFRDA solution. In case of suspension beyond a reasonable time, all the data within it shall be immediately deleted/ destroyed and certify the VM and data destruction to PFRDA as per stipulations and shall ensure that the data cannot be forensically recovered.
- e) SI shall ensure that VMs receive OS patching, health checking, Systematic Attack Detection, and backup functions.
- f) Monitor VM up/down status and resource utilization such as RAM, CPU, Disk, IOPS and network.
- g) Provide services or software based virtual load balancer Services (VLBS) through a secure, hardened, Virtual Load Balancer platform.
- h) Provide services or software based virtual load balancing as a service to provide stateful failover and enable Customers to distribute traffic load across multiple servers.
- i) Support Clustering
- j) Operating System (OS)
 - Service shall support one or more of the major enterprise grade OS.
 - Management of the OS processes and log files including security logs retained in guest VMs.
 - Provide anti-virus protection.
 - Provide OS level security as per standard operational procedures.
- k) Storage:
 - Persistent Bundled Storage is retained when the virtual machine instance is stopped or
 - Non-Persistence – Non-Persistence Bundled Storage is released when the virtual instance is stopped. If quoting Non-Persistence VM, CSP shall provide VM Block storage.
- l) RAM (Random Access Memory): Memory (RAM) requirement should be different for different type of servers such as web servers and database servers. VCPU and RAM ratio should be proportionate.
- m) Disk Space options allocated for all virtual machines and file data supporting a minimum of 40GB bundled storage.
- n) Virtual Machine Block Storage Service Requirements:
 - Service shall provide scalable, redundant, dynamic Web-based storage.

- Service shall provide SI with the ability to procure and provision block storage capabilities for cloud virtual machines remotely with two factor authentication via the SSL through a web browser.
 - Service shall provide block storage capabilities on-demand, dynamically scalable per request for virtual machine instances.
 - Block Storage – Once mounted, the block storage should appear to the virtual machine like any other disk.
 - Input/output (I/O) Requests: Input/output requests on block storage
- o) PFRDA retains ownership of all virtual machines, templates, clones, and scripts/applications created for its applications.
 - p) PFRDA retains the right to request full copies of these virtual machines at any time.
 - q) Support a secure administration interface – such as SSL/TLS or SSH – for SI/PFRDA designated personnel to remotely administer their virtual instance.
 - r) Provide the capability to dynamically allocate virtual machines based on load, with no service interruption.
 - s) Provide the capability to copy or clone virtual machines for archiving, troubleshooting, and testing.
 - t) Cloud provider should offer fine-grained access controls including role-based access control, use of SSL certificates, or authentication with a multi-factor authentication.
 - u) Cloud service should support auditing with features such as what request was made, the source IP address from which the request was made, who made the request, when it was made, and so on.
 - v) PFRDA should be permitted to bring and upload additional properly licensed non-operating system software for operation in cloud as required for PFRDA solution for use within the Services by installing it directly on a VM for any Integration.
 - w) RAM or CPU of virtual machine should scale automatically whenever there is spike in load to deliver application availability even during spike in load.
 - x) Provide facility to configure virtual machine of required vCPU, RAM, and Disk.
 - y) Provide facility to use different types of disks like SAS, SSD based on type of application.

2. Cloud Storage Requirements

- a) The service shall be available online, on-demand, and dynamically scalable up or down per request for service.
- b) Service shall provide storage capabilities on-demand, dynamically scalable per request and management of the storage.

- c) **Data Transfer Bandwidth:** Bandwidth utilized to transfer files/objects in/out of the providers infrastructure supporting a minimum of Ten (10) GB of data transferred (in and out) within 1 hour via the network.

3. Utilization Monitoring

- a) Provide automatic monitoring of resource utilization and other events such as failure of service, degraded service, etc. via service dashboard or other electronic means.
- b) Real time performance thresholds
- c) Real time performance health checks
- d) Real time performance monitoring & Alerts
- e) Historical Performance Monitoring
- f) Capacity Utilization statistics
- g) Cloud Resource Usage including increase/decrease in resources used during auto-scale.
- h) Trouble Management –Provide Trouble ticketing via online portal/interface (tools).
- i) User Profile Management - Support maintenance of user profiles and present the user with his/her profile at the time of login.

42.2 Data Management

1. Manage data isolation in a multi-tenant environment.
2. Provide tools and mechanism for defining data backup requirements & policy.
3. Provide tools and mechanism for configuring, scheduling, performing, and managing back-ups and restore activities (when required) of all the data including but not limited to files, folders, images, system state, databases, and enterprise applications in an encrypted manner as per the defined policy.
4. Transfer data back in-house either on demand or in case of contract or order termination for any reason, without any additional cost to PFRDA.
5. Manage data remanence throughout the data life cycle.
6. Provide and implement encryption & security mechanisms for handling data at rest and in transit.
7. The SI must implement robust security measures to protect against ransomware attacks and provide comprehensive incident response plan outlining the steps and procedures in the event of a ransomware attack.
8. Shall not delete any data from cloud at the end of the agreement (for a maximum of 180 days beyond the expiry of the Agreement) without written approval of PFRDA.
9. When SI (with prior approval of PFRDA) scales down the infrastructure services, SI will be responsible for deleting or otherwise securing PFRDA's Content/data prior to VM deletion and in case deleted, shall ensure that the data cannot be forensically recovered.

42.3 Testing Requirements for Cloud

Following cloud resource deployment/provisioning, the testing of the same at Cloud site becomes very important. Therefore, SI must perform following testing:

1. Infrastructure testing – SI should perform various testing procedures listed below on infrastructure (server, storage, and network infrastructure) provided at Cloud site:
 - a. VM testing.
 - b. Storage/Disk IO testing
 - c. Network throughput testing
 - d. CPU and RAM benchmarking testing
 - e. Read/Write latency testing.

** every infrastructure component of the architecture should be hardened
2. Data Integrity Testing, Reverse Replication Testing and Switch over testing - the Cloud service provider will facilitate to carry out these testing, whenever required.

42.4 Security Requirements

1. SI through the CSP is responsible for provisioning, securing, monitoring, and maintaining the services, network(s), and software that support the infrastructure.
2. In case, some of the System Software is provided as Software as a Service (SaaS) for the project, such software to be cloud agnostic.
3. The cloud facility should implement the security tools on the following aspects but not limited to:
 - a. Security & Data Privacy (Data & Network Security including Anti-Virus)
 - b. Virtual Firewall
 - c. Multi Factor authentication
 - d. VPN, IPS, Log Analyzer/Syslog
 - e. SSL, DDOS Protection, HIDS/NIDS
 - f. Rights Management, SIEM, Integrated Vulnerability Assessment, SOC
 - g. Private Virtual Zones, Data Privacy, Data Encryption
 - h. Certifications & Compliance
 - i. Authentication & Authorization, and Auditing & Accounting
4. Meet the ever-evolving security requirements as specified by CERT-In (<http://www.cert-in.org.in/>)
5. Meet any security requirements published (or to be published) by MEITY or any standards body setup/recognized by Government of India from time to time and notified to CSP by MEITY as a mandatory standard. Security reports for PFRDA setup may be verified by PFRDA anytime, if required.

6. Implement industry standard storage strategies and controls for securing data in the Storage Area Network so that clients are restricted to their allocated storage.
7. Cloud offering should have built-in user-level controls and administrator logs for transparency and audit control.
8. Cloud Platform should be protected by fully managed Intrusion detection system using signature, protocol, and anomaly-based inspection thus providing network intrusion detection monitoring.
9. Cloud platform should provide Edge-to-Edge security, visibility and carrier-class threat management and remediation against security hazards like Denial of Service (DoS) and Distributed Denial of Service (DDoS) attacks, botnets, etc. Also, shall provide protection against network issues such as traffic and routing instability.
10. Cloud platform should provide Web Application Filter for OWASP Top 10 protection as a service that can be enabled for PFRDA that require such a service.
11. Cloud Service provider shall allow audits of all administrator activities performed by PFRDA and allow PFRDA to download copies of these logs in CSV format.
12. Maintain the security features to investigate incidents detected, undertake corrective action, and report to PFRDA as appropriate.
13. Deploy and update commercial anti-malware tools, investigate incidents, and undertake remedial action necessary to restore servers and operating systems to operation.
14. Shall provide consolidated view of the availability, integrity, and consistency of the Web/App/DB tiers.
15. Should enforce password policies (complex password, change password in some days etc.)
16. Shall follow GoI guidelines and CERT-In Security guidelines. Where there are no procedural guides, use generally accepted industry best practices for IT security.
17. PFRDA has the right to perform audits, scans, reviews, or other inspections of Cloud IT environment for PFRDA that is being used to provide or facilitate services for PFRDA through a MEITY empanelled third party auditor.
18. SI shall be responsible for the following privacy and security safeguards.
19. SI shall not publish or disclose in any manner, without PFRDA's written consent, the details of any safeguards either designed or developed for PFRDA.
20. To the extent required to carry out a program of inspection to safeguard against threats and hazards to the security, integrity, and confidentiality of any data collected and stored by SI, SI shall afford the logical access to the online administration console, monitoring tools, audit logs within 72 hours of the request. Automated audits shall include, but are not limited to, the following methods:
 - a. Authenticated and unauthenticated operating system/network vulnerability scans
 - b. Authenticated and unauthenticated web application vulnerability scans
 - c. Authenticated and unauthenticated database application vulnerability scans

42.5 Server Monitoring, Administration

Configuration of server parameters, operating systems administration and tuning.

- a. Operating system administration, including but not limited to management of users, processes, resource contention, preventive maintenance, and management of updates & patches to ensure that the system is properly updated, with minimum or no downtime.
- b. Re-installation in the event of system crash/failures.
- c. Maintenance of a log of the performance monitoring of servers including but not limited to monitoring CPU, disk space, memory utilization, I/O utilization, etc.
- d. Event log analysis generated in all the sub systems including but not limited to servers, operating systems, applications, etc. Ensuring that the logs are backed up and truncated at regular intervals.
- e. Periodic health check of the systems (covering all cloud resources offered.), troubleshooting problems, analysing, and implementing rectification measures.
- f. At any point of time of the contract if, it is found that CSP fails to meet the guidelines & standards as set by GoI within the timeframe set by MEITY, PFRDA reserves the right to instruct SI to replace & appoint new CSP with approval of PFRDA. The new CSP should have all the technical competencies and capabilities to fulfil requirements as given for this project to meet the required Government guidelines and standards. PFRDA will not bear any additional cost for this activity.

42.6 Backup Services

1. Should configure, schedule, and manage backups of all the data including but not limited to files, folders, images, system state, databases, and applications as per the policy developed by SI in consultation with PFRDA.
2. Shall be responsible for file system and database backup and restore services. As part of the responsibilities also to:
 - a. Perform and store data and file backups (process of duplicating the users “to-be-backed- up” “Target Data”) consisting of an initial full back up with daily incremental backups for files.
 - b. For the files, perform weekly backups.
 - c. For the databases, perform a twice weekly full database backup, with a three times daily backup of database log files.
 - d. Cloud platform should provide encryption of all backup files and data and management of encryption keys as a service that can be enabled for PFRDA that require such a service.
 - e. Monitor and manage backup activity.

- f. Restore the requested data with the objective to initiate a minimum of 100 percent of the total number of restore requests per calendar month within a two-hour timeframe.
 - g. Retain inactive versions of backed up files for 90 days and the last version of a deleted file for 180 days.
 - h. Retain database backups for one hundred eighty (180) days.
3. All logs post the active storing tenure would be stored in archival storage.
4. Perform administration, tuning, optimization, planning, maintenance, and operations management for backup and restore.
5. Provide and install additional infrastructure capacity for backup and restore, as required, and perform backup on the next scheduled backup window in case of any scheduling conflicts between backup and patch management.

42.7 Disaster Recovery & Business Continuity Services

1. In addition to the Primary DC, responsibility for Disaster Recovery Services so as to ensure continuity of operations in the event of failure of primary data centre and meet the RPO and RTO requirements. RPO should be less than or equal to 30 minutes and RTO shall be less than or equal to 120 minutes. PFRDA at its discretion in conjunction with the SI may reduce the RPO and RTO during contract period. However, during the change from DC to DRC or vice-versa (regular planned changes), there should not be any data loss.
2. There shall be asynchronous replication of data between Primary DC and DR DC. Responsibility includes sizing and providing the DC-DR replication link to meet the RTO and the RPO requirements.
3. The primary DC and the DRC should be from different physical locations supporting active – active/active-passive arrangement.
4. In case of any disaster, the security posture of the DR site shall be identical to the posture provided in the DC.
5. The disaster recovery site shall have Similar environment, processes, and controls (security, etc.) as that of the primary DC. During normal operations, the Primary Data Centre will serve the requests. During this period, the compute environment for the application in DR shall be available but with minimum possible compute resources required for a functional DR as per the solution offered. The application environment shall be installed and ready for use. DR Database Storage shall be replicated on an ongoing basis and shall be available in full (100% of the PDC) as per designed RTO/RPO and replication strategy. The storage should be 100% of the capacity of the Primary Data Centre site.
6. The scope of the DR drill lies with SI for planning & monitoring of the entire activity. In the event of a site failover or switchover, DR site will take over the active role, and all requests will be routed through that site.
7. Application data and application states will be replicated between data centres so that when an outage occurs, failover to the surviving data centre can be

- accomplished within the specified RTO. This is the period during which the Compute environment for the application shall be equivalent to DC.
8. The installed application instance and the database shall be usable, and the same SLAs as DC shall be provided. The Database and storage shall be of full capacity and the licenses and security shall be for full infrastructure. The bandwidth at the DR shall be scaled to the level of Data centre. Users of application should be routed seamlessly from DC site to DR site.
 9. SI along with CSP shall conduct DR drill for approximately two days at the interval of every six months of operation where in the Primary DC must be deactivated and complete operations shall be carried out from the DR Site. However, during the change from DC to DRC or vice-versa (regular planned changes), there should not be any data loss.
 10. Shall clearly define the procedure for announcing DR based on the proposed DR solution. Shall also clearly specify situations in which disaster shall be announced along with the implications of disaster and the time frame required for migrating to DR.
 11. Shall plan all the activities to be carried out during the Disaster Drill and issue a notice to the Department at least two weeks before such drill along with a risk mitigation plan & probable impact analysis report.
 12. Should offer dashboard to monitor RPO and RTO of each application and database.
 13. Should offer switchover and switchback of individual applications instead of entire system.
 14. Any lag in data replication should be clearly visible in dashboard and alerts of same should be sent to respective PFRDA officials.
 15. It is assumed that during any disaster, DR will become the DC as per the RPO and RTO parameters. However, in a situation, the DR fails and we don't have an active failover mechanism, the SI will create a new DR site within timeframe as guided by RTO and RPO.

42.8 Cloud capacity management workshop

The SI shall conduct training sessions, explaining features of the Cloud system and how to use these features for in case of any departmental requirement. The training material (master copy) will be provided by the solution provider. Hands on training sessions should be of about one day duration and shall be conducted. The training shall be provided by a trained & experienced professional having excellent communication skills. PFRDA will be providing desktops/necessary infrastructure to trainers. The training should be at no extra cost to PFRDA. Bidder will submit two hard copies of the orientation and technical training to PFRDA.

| # | Type of Training | Target Audience | No. of sessions | Minimum Duration per | Manual/ Material Required |
|---|------------------|-----------------|-----------------|----------------------|---------------------------|
| | | | | | |

| | | | | Session | |
|---|-------------------|-----------------|--|---------|-----|
| 1 | Technical Session | PFRDA Officials | Once in every 6 months, for initial two years. Thereafter for any change in the c-panel/tools. | 2 Days | Yes |

42.9 Reports (reports to be preferred by APM)

1. Monthly reports

- a. Summary of issues/complaints logged at the Help Desk
- b. Summary of resolved unresolved and escalated issues/complaints.
- c. Log of backup and restoration undertaken.
- d. Summary of systems rebooted.
- e. Summary of issues/complaints logged with the OEMs.
- f. Summary of changes undertaken in the Data Centre with respect to PFRDA setup including major changes like configuration changes, patch upgrades, etc.
- g. Report for Security Breaches if any and action taken by CSP.
- h. Patch update status of all servers including the Virtual Machines
- i. Component wise server as well as Virtual machines availability and resource utilization
- j. Consolidated SLA/(non)- conformance report.
- k. Log of preventive/scheduled maintenance undertaken
- l. Log of break-fix maintenance undertaken
- m. All relevant reports required for calculation of SLAs.

2. Quarterly Reports

- a. Consolidated component-wise availability and resource utilization.
- b. All relevant reports required for calculation of SLAs.
- c. The MIS reports shall be in-line with the SLAs and the same shall be scrutinized by PFRDA.
- d. The cloud service provider will also provide any other report requested by PFRDA or any other agency approved and authorized by PFRDA.

Note: Beside the above-mentioned reports, PFRDA may ask for specific reports from the SI as and when such reports will be required.

42.10 Security Audit

1. The SI shall ensure that the Cloud Service Provider's services offerings shall comply with the audit requirements defined under the terms and conditions of the empanelment as per MEITY guidelines as and when published.

2. The SI shall conduct vulnerability and penetration test from a third-party CERT-IN empanelled agency on the Cloud solution annually and reports should be shared at the cost of SI. SI needs to update the system in response to any adverse findings in the report, without any additional cost to PFRDA. PFRDA may also depute auditors to conduct security check/vulnerability test/penetration test. Additionally, the SI shall ensure all newly deployed Infrastructure is in compliant with all applicable regulatory requirements.

42.11 STQC Audit Compliance

The SI is required to ensure that the websites are fully compliant with the guidelines and standards set forth by the Standardization Testing and Quality Certification (STQC) Directorate under the Ministry of Electronics and Information Technology (MEITY), Government of India. This includes adherence to the Web Quality and Accessibility guidelines (such as WCAG 2.2) and any other applicable standards related to security, performance, and functionality. The vendor must facilitate a thorough audit process conducted by the STQC to certify compliance with these standards. All identified gaps or deficiencies must be promptly addressed and resolved by the vendor. Additionally, the vendor is expected to provide all necessary documentation, testing reports, and certificates required for the successful completion of the audit. The final deliverable must be an STQC-compliant, secure, accessible, and user-friendly website that meets the required benchmarks for quality and performance.

42.12 Additional Roles and Responsibilities of SI with respect to cloud

1. SI to provide best Services sizing for this project along with the other products.
2. SI shall develop, prepare, and provide a Cloud Solution Implementation Plan. The Implementation Plan shall have the detailed design, specifications, drawings, and schedule along with inspection and test plan, risk matrix and risk mitigation strategy, training material and documentation for all deliverables.
3. The SI will be responsible for:
 - a. Commissioning the appropriate bandwidth, for smooth replication of data.
 - b. Envisaging application-level recovery, scalable to site level recovery based on the impact of the disaster.
 - c. Ensuring related DNS changes for internet, application availability and integrity, and database synchronization with application at DR site.
 - d. Monitoring and maintenance reports over a monthly basis and as and when required.
 - e. Ensuring availability of server logs/records for audits
 - f. Accessing the monitoring tools for measuring the service levels, application performance, server performance, storage performance and network performance.
 - g. Supporting in audit of the entire system on yearly basis

- h. Handing over of complete data in the desired format to PFRDA on expiration/termination of the contract, which can be easily accessible and retrievable
- 4. The SI should ensure reverse replication happens when the DR setup is acting as the main setup. The solution should ensure consistency of data in reverse replication till the operations are not being established at the Cloud setup. The RPO would be applicable in reverse replication also. The entire data should be made available for restoration at Primary Data Centre.
- 5. Restoration at Primary Data Centre will be the prime responsibility of SI. SI to ensure that backup data format to be restorable at Cloud setup or DR setup.
- 6. Detailed RACI matrix for the same is to be provided by SI.

42.13 Application Performance Management (APM) tool & SLA monitoring tool

- 1. SI to provide an enterprise grade APM tool & SLA monitoring tool to PFRDA
- 2. SI to submit reports generated from APM tool from time to time & on need basis to PFRDA.
- 3. SI should submit the following reports needs on need basis (but not limited to):
 - a. Real-time monitoring to track application performance.
 - b. End-to-end visibility into the application stack.
 - c. Root cause analysis for quick issue resolution.
 - d. Customizable alert configurations for performance monitoring.
 - e. Efficient resource utilization.
 - f. Comprehensive reporting and analytics.
 - g. Integration with existing monitoring and management tools.
 - h. Robust security and compliance features to safeguard applications and data.
 - i. Various SLA monitoring mechanisms as defined in the SLA section needed by PFRDA.

43. Waiver of Rights

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

44. Liquidated Damages (LD)/Compensation

- 44.1 If SI fails to deliver any or all of the Service(s)/Systems or perform the Services within the time period(s) specified in the RFP/Contract/Agreement, PFRDA shall, without prejudice to its other rights and remedies under and in accordance with the RFP/Contract/Agreement, seek compensation from payments, which are due to the SI.
- 44.2 The compensation will be applicable as mentioned in SLA and LDs/Compensation - **Appendix-IV** of this RFP.
- 44.3 PFRDA reserves its right to recover compensation amount by any mode such as adjusting from any payments to be made by PFRDA to SI and forfeiture of the security.
- 44.4 PFRDA may, at its discretion, waive the compensation liquidated damages in case the delay may not be attributable to SI.
- 44.5 Any such recovery or compensation shall not in any way relieve the SI from any of its obligations to complete the works/service(s) or from any other obligations and liabilities under the Contract/Agreement.

45. General Requirements

- 45.1 SI shall provide dedicated resources for PFRDA's project.
- 45.2 There should be sufficient headroom (at an overall level in the compute, network and storage capacity offered) available for near real time provisioning during any unanticipated spikes in the user load.
- 45.3 Ability to integrate fully with the Government of India approved Certifying Authorities to enable PFRDA to use the Digital Certificates/Digital Signatures.
- 45.4 PFRDA retains ownership of all templates, clones, and scripts/applications, data created for/by PFRDA's application and retains the right to request (or should be able to retrieve) full copies at any time.
- 45.5 PFRDA shall be provided access rights (including the underlying secure Connection) to the user administration/portal of cloud services to have visibility into the dashboard, SLAs, management reports, etc. provided by the Cloud Service provider.
- 45.6 SI will ensure that CSP shall not provision any unmanaged VMs for the applications.
- 45.7 SI will ensure that CSP shall provide interoperability support with regards to available APIs, data portability etc. for PFRDA to utilise in case of Change of cloud service provider, migration to different cloud/in-house infrastructure, burst to a different cloud service provider or availing backup or DR services from a different cloud service provider as and when needed.

- 45.8 Should adhere to the ever-evolving guidelines as specified by CERT-In (<http://www.certin.org.in/>)
- 45.9 Should adhere to the relevant standards published (or to be published) by Ministry of Electronics & Information Technology (MEITY) or any standards body setup/recognized by Government of India
- 45.10 Cloud Infrastructure shall be accessible to PFRDA, or any third party engaged by PFRDA for inspection and audit purposes, if any. Bidders shall also adhere to the relevant audit requirements as defined in the RFP.

46. Compliance

- 46.1 SI shall be responsible to comply with the provisions of PFRDA Act and the Rules and Regulations framed thereunder, and the directions/ guidelines/ notification/ circulars issued by PFRDA from time to time, and any other applicable laws/Rules/Regulations/guidelines in force.
- 46.2 Disputes, if any, arising out of this selection process, shall be subject to the exclusive jurisdiction of Courts at New Delhi only. Post the award of the Contract, the disputes, if any arising thereunder shall be settled in terms of the provisions of the Arbitration and Conciliation Act, 1996, as provided under such Contract.

47. Interpretation

In case of any clarification with regard to the terms used in this RFP and conditions of this RFP, the interpretation of PFRDA, shall be final.

Annexure-I: Proposal Submission Covering Letter

To,

Chief General Manager (In charge- PFRDA-Connect)
Pension Fund Regulatory and Development Authority (PFRDA)
E-500, Tower E, 5th Floor, World Trade Centre, Nauroji Nagar,
New Delhi-110 029

Subject: Submission of Proposal for Request for Proposal for Selection of System Integrator (SI) for Design, Development, Implementation and Maintenance of PFRDA Website (PFRDA-Connect): RFP no.- PFRDA/2024/TARCH/PFRDA-Connect/01, dated 6th November 2024.

Dear Sir,

1. We, the undersigned, hereby submit our proposal in response to your Request for Proposal (RFP) for Selection of System Integrator (SI) for Design, Development, Implementation and Maintenance of PFRDA-Website (PFRDA-Connect) RFP no.- PFRDA/2024/TARCH/PFRDA-Connect/01, dated 6th November 2024, for the provision of professional services. Enclosed herewith is our comprehensive submission, comprising both the Technical and Financial Proposals.
2. We affirm that the details provided in our proposal are accurate and complete, and we acknowledge that any misrepresentation may result in our disqualification from the selection process.
3. We confirm that we have thoroughly reviewed and fully understand the Terms of Reference and the associated responsibilities as outlined in the RFP. Furthermore, we accept the Terms and Conditions as stipulated.
4. We agree to maintain the validity of our proposal for a period of [Proposal Validity] and are committed to commencing the services within [Number of days] days from the date of contract execution, should our proposal be accepted.
5. We recognize that the Pension Fund Regulatory and Development Authority (PFRDA) is under no obligation to accept our proposal and that all costs incurred in the preparation and submission of this proposal shall be borne solely by us. We acknowledge that PFRDA will not be held liable for any such costs, irrespective of the outcome of the evaluation process.
6. We appreciate your consideration of our proposal and look forward to the possibility of collaborating with PFRDA.

(Authorised Signatory)

Signature:

Name:

Designation:

Seal:

Date:

Annexure-II: Bidder Details

(To be submitted on Bidder's letter head)

Details to be filled by bidder.

| S. No. | Particulars | Details |
|--------|--|---------|
| a. | Name | |
| b. | Constitution of the company (Public/Private/LLP) | |
| c. | Date of Incorporation and/or commencement of business | |
| d. | Certificate of incorporation | |
| e. | Brief description of bidder including details of its main line of business | |
| f. | Company website URL | |
| g. | Company PAN | |
| h. | Company GSTIN | |
| i. | Company Bank Account Number (to be used for returning EMD) | |
| j. | Company bank details (Name, Branch, IFSC, etc.) | |
| k. | Particulars of the Authorized Signatory of bidder Name Designation Address Phone Number (Landline) Mobile Number Fax Number Email Address | |

(Authorised Signatory)

Signature:

Name:

Designation:

Seal:

Date:

Annexure-III: Financial Capability Statement

(On the leader head of the auditor)

Ref:

Date: DD/MM/YYYY

To,

Chief General Manager
In charge- PFRDA-Connect
Pension Fund Regulatory and Development Authority (PFRDA)
E-500, Tower E, 5th Floor, World Trade Centre, Nauroji Nagar,
New Delhi-110 029

Subject: Certification of Financial Statements for M/s [Company Name]

Dear Sir,

I/We, the undersigned, hereby certify that I/We have thoroughly scrutinized and audited the financial statements of M/s [Company Name] for the last three financial years (i.e., FY 2021-22, FY 2022-23, FY 2023-24). I/We confirm that M/s [Company Name] has been a profitable entity throughout this period and has not incurred any cash loss.

The details of the Net Worth, Profit After Tax (PAT), Total Turnover, and Turnover from IT and IT-enabled Services (ITeS) for the last three financial years, based on the audited financial statements, are as follows:

| Financial Year | Net Worth (INR Crore) | PAT (INR Crore) | Total Turnover (INR Crore) | Turnover from IT/ITeS (INR Crore) | Average Turnover from IT/ITeS (INR Crore) |
|----------------|-----------------------|-----------------|----------------------------|-----------------------------------|---|
| FY 2021-22 | | | | | |
| FY 2022-23 | | | | | |
| FY 2023-24 | | | | | |
| Average | | | | | |

Signed and Sealed by Statutory Auditor

Name:

Designation:

Address:

Telephone & Fax:

E-mail address:

Annexure-IV: Pre-Bid Query Format

(To be provided strictly in Excel format)

All the pre-bid queries to be submitted through email (itprojects-pfrda@pfrda.org.in) only by the given due date. In no other way, pre-bid queries will be entertained. Pre-bid queries to be submitted strictly in the format given below:

(To be provide strictly in Excel format)

| Sl. No | RFP Page No | RFP Clause No. | Existing Clause | Query | Suggestions |
|--------|-------------|----------------|-----------------|-------|-------------|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

(Authorised Signatory)

Signature:

Name:

Designation:

Seal:

Date:

Annexure-V: Eligibility Criteria

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

| Sl.No | Eligibility Criteria | Description/Requirement | Documents to be Submitted |
|-------|----------------------|---|--|
| 1. | Legal Entity | <p>a. Bidder should be registered as a Company in India as per the Indian Companies Act, 1956/2013 or a Limited liability Partnership firm registered under the Limited Liability Partnerships Act, 2008.</p> <p>b. Bidder should be having valid GST number.</p> <p>c. Should have been in existence and operational for the last five complete Financial years.</p> | <p>a. For a & c. - Certificate of Incorporation/LLP Registration and Annexure-II and Annexure-III (Financial Capability statement)</p> <p>b. For b - GST registration certificate</p> |
| 2. | Financial stability | <p>Bidder must have an average turnover of Rs. Forty (40) Crore or above from IT and IT enabled services (ITeS) during the last 03 (three) Financial year(s) (i.e. FY 2023-24, FY 2022-23, FY 2021-22) and must have been a profitable entity for the last three Financial years* (i.e., FY 2023-24, FY 2022-23, FY 2021-22) and has not incurred any cash loss during the period.</p> <p>*In case, the company/LLP operates on calendar year, the audited statements will be required for calendar years 2021, 2022 and 2023</p> | <p>Audited Financials or Certificate issued by Company's statutory auditor on the Profitability (PAT) and cash loss for the last three Financial years (i.e. FY 2023-24, FY 2022-23, FY 2021-22) as per Annexure-III</p> |

| Sl.No | Eligibility Criteria | Description/Requirement | Documents to be Submitted |
|-------|---|---|---|
| 3. | Similar Project Implementation | <p>Bidder must have successfully completed a minimum of one (01) software solution or project as a System Integrator (SI) on or after 01-11-2019 till bid submissions end date of this RFP. This project should be related to Website/Portal development using CMS. The qualifying experience should be with Central or State Government, Regulatory Bodies, Central or State Government-owned Organizations, Public Sector Undertakings (PSUs), Autonomous Bodies, Public Sector Banks, Public Sector Insurance Companies, Central Public Sector Enterprises (CPSEs), with minimum INR 1 crore, excluding hardware costs.</p> <p>In the event that the project undertaken by the bidder involves both website development and additional scope of work, the project will be considered completed once the website development is finalized, and the website has gone live.</p> | <p>(i) Work order + Completion certificates from the client. OR (ii) Work order + Self certificate of completion (Certified by the Authorised Signatory giving details of execution of the project) as per <u>Annexure – X</u> OR (iii) Project completion Certificate issued by Company's statutory auditor/Company Secretary on letterhead giving details of execution of the project as per <u>Annexure – X</u></p> <p>In case of non-availability of acceptance letter from the client on completion of the project, PFRDA may ask for Invoice /payment receipt and the corresponding TDS certificate to ascertain project completion status.</p> |
| 4. | Eligibility criteria for Cloud Service provider (CSP) to be engaged by SI | Meity empaneled CSP for providing cloud services in the form of VPC | Certificate/document showcasing that CSP is Meity empaneled as on due date of submission of bid |

| Sl.No | Eligibility Criteria | Description/Requirement | Documents to be Submitted |
|-------|---------------------------------|--|---|
| 5. | Legal Litigation & Blacklisting | Bidder should not be under debarment/blacklist period for breach of contract/fraud/corrupt practices by any Regulatory bodies/ Scheduled Commercial Banks/Public Sector Undertaking/State or Central Government or their agencies/departments as on date of submission of the bid. | Bidders should provide certificate of not blacklisted as per Annexure XVI . |

All information furnished against each of the above criteria must be supported by valid documents as mentioned above along with **indexing**. The authorized **signatory of bidder must sign all documents**. Relevant portions, in the documents submitted in pursuance of eligibility criteria, should be highlighted. If all of these conditions mentioned above pertaining to the eligibility criteria are not fulfilled or supporting documents are not submitted with the eligibility criteria, then the Bid will be summarily rejected, and no queries will be entertained.

Annexure-VI: Technical Evaluation Parameters

1. The bid document will be evaluated as per the requirements specified in the RFP. Bidder is required to submit all required documentation in support of the functional specification criteria specified. Technical presentation & product walkthrough will be a part of the bid evaluation process.
2. Each Technical Bid will be assigned a technical score out of a maximum of 100 marks. Only bidders with overall score of 70 marks or more will be technically qualified and short listed for financial evaluation. Failing to secure minimum marks shall lead to disqualification of the technical bid/proposal.

3. Scoring Model

Bidder's technical proposal will be evaluated as per the requirements specified in the RFP and adopting the following evaluation criteria.

| Section | Evaluation Criteria | Total Marks Awardable |
|---------|--|-----------------------|
| A | Bidder's Profile & Experience | 12 |
| B | Approach & methodology | 25 |
| C | Proposed Solution | 35 |
| D | Product / CMS walkthrough, understanding of the project, global standards & design walkthrough | 12 |
| E | Resource Planning, Key personnel proposed | 8 |
| F | Client References | 8 |
| | Total | 100 |

The detailed scoring model (section-wise) is given below.

A. Bidder's Profile and Experience (12 marks)

| Sl. No | Evaluation Criteria | Marking Criteria | Maximum Marks |
|--------|--|--|---------------|
| 1 | Bidder must have successfully completed a software solution or project as a System Integrator (SI) on or after 01-11-2019 till bid submissions end date of this RFP. This project should be related to Website/Portal development using CMS. The qualifying experience should be with Central or State Government, Regulatory Bodies, Central or State Government-owned Organizations, Public Sector | 2 projects: 1 mark 3 projects: 3 marks 4 projects or more: 5 marks | 5 |

| | | | |
|---|---|---|----|
| | Undertakings (PSUs), Autonomous Bodies, Public Sector Banks, Public Sector Insurance Companies, Central Public Sector Enterprises (CPSEs), with minimum INR 1 crore, excluding hardware costs. In the event that the project undertaken by the bidder involves both website development and additional scope of work, the project will be considered completed once the website development is finalized, and the website has gone live. | | |
| 2 | Experience in the CMS platform proposed for PFRDA's website design & development | 1 project: 1 mark 2 projects: 2 marks 3 projects or more :3 marks | 3 |
| 3 | CMMi Certification | CMMi Level 3: 1 mark CMMi Level 5: 2 marks | 2 |
| 4 | Proven experience in collaborating with same MEITY-empaneled CSP providing VPC | 1 project: 1 mark 2 projects or more: 2 marks | 2 |
| | Total | | 12 |

B. Proposed Approach & methodology (25 marks)

| Sl. No | Points to be covered | Maximum Marks Awardable |
|--------|---|-------------------------|
| 1 | What will be the approach to stakeholder engagement for the project? | 3 |
| 2 | How can the design & approach of the proposed website help PFRDA in its objectives as country's pension regulator? | 1 |
| 3 | Approach for Implementation of the project including Tools and Technologies used for project control and execution (e. g. Configuration management, Project monitoring and reporting, etc.) | 3 |
| 4 | Approach to project management and governance | 3 |
| 5 | Approach to information layout, UI/UX design and CMS integration for PFRDA Website Design & development | 3 |

| | | |
|--------------|--|-----------|
| 6 | Solution architecture, Network architecture, Security Architecture | 4 |
| 7 | Approach & methodology for implementing security compliance | 2 |
| 8 | Approach to complete deployment and go-live | 1 |
| 9 | What would be the post-implementation project monitoring approach | 3 |
| 10 | Testing approach & methodology | 2 |
| Total | | 25 |

C. Proposed Solution (35 marks)

- The Bidder must provide a response to each of the features mentioned under [SCHEDULE II](#), which could be any one from the following categories:
 - Out of the Box / Available-** If a requirement is a direct fit and readily available in the product or solution provided by the successful bidder. Updated version in the future may requires no rework.
 - Configurable-** If a requirement needs one-time configurational changes and can be done from the user end and does not require new coding. Updated version in future may requires no rework.
 - Customizable** - If the customization involves modification at Scripting/ XML/ CSS level without touching the codebase of the solution. If the customization involves module selection, table configuration utilizing the APIs of the application. If the customization involves code level changes including creation of new module.
 - 3rd Party Integration** – If solution uses a third-party’s API to power an integration with another app or web service enabling independently designed applications to work together
 - Not Available** – If any of the requirement is non-configurable, non-customizable nor 3rd party integration is available, then it will be classified as not available
- A logical response should be given by marking under the category, which shall apply to the requirement. Where a response requires explanation, the Bidder must provide the explanation in the “Remarks” column or on a separate page, if necessary, with reference to the requirement number. Multiple responses to single requirement will not be considered
- Any requirement where the Bidder has not marked a response or has provided multiple responses, will NOT be scored.
- The responses of the Bidders to the requirements shall be scored as given below in the table below:

(i) Solution Feature Requirements - Evaluation criteria

Solution Feature Requirement in [SCHEDULE II](#) – Response to all mentioned requirements will be categorized as either: Out-of-the-Box (Available) /

Configurable / Customizable / 3rd party integration / Not Available. The scores will be as follows:

| Category | Business Critical (BC) Score | Desirable (D) Score |
|--------------------------|------------------------------|---------------------|
| Out of the Box/Available | 10 | 7 |
| Configurable | 7 | 5 |
| Customization | 5 | 3.5 |
| 3rd Party Integration | 3 | 2 |
| Not Available | 0 | 0 |

(ii) Non-functional requirements - Evaluation criteria

Non-Functional Requirement under [SCHEDULE II, Section 2](#) – Response to all mentioned requirements will be categorized as either: Available / Configurable / Customizable / Not Available.

| Category | Score |
|--------------------------|-------|
| Available / Configurable | 10 |
| Customization | 5 |
| Not Available | 0 |

*(Note: All non-functional requirements are considered as **Business Critical**)*

5. Total number of ‘Business Critical’ items are 114 and total number of ‘Desirable’ items are 13. The maximum marks for both the categories is 1231 keeping 10 as highest marks for ‘Business Critical’ item and 7 as highest marks for ‘Desirable’ item. The maximum mark for non-functional requirements is 540 keeping 10 as highest marks for each requirement. The total maximum marks = 1771. Marks obtained by the bidder through selecting the response category will be calculated using the following formula:

$$\text{Total marks obtained} = (\text{Marks scored by bidder (i+ii)} / \text{Total maximum marks}) * 35$$

6. In case response to any of the requirements is left blank by the Bidder, no marks will be awarded against that requirement.

Note: These requirements may be tested during the presentation stage and the marks may be modified accordingly.

D. Product / CMS walkthrough, understanding of the project, standards & design walkthrough (10 marks)

Within this segment, a maximum of ten (10) marks will be assigned to evaluate the bidders' proficiency in delivering a comprehensive Content Management System (CMS) and their understanding of the project requirements. Bidders must demonstrate a live walkthrough of

the product or CMS (no static presentations or wireframes) that highlights key features in accordance with the Scope of Work (SoW). The demonstration can be supported with sample data to showcase website navigation, design standards, user experience (UX), and content management functionalities. Three (03) design samples should be demonstrated during the presentation. Marks will be allocated based on the bidder's understanding of the project, adherence to global design standards, the scalability and adaptability of the CMS, and the overall alignment with PFRDA's objectives. Specific focus areas will include the ease of use, multilingual support, compliance with GIGW and WCAG, security features, and the efficiency of the CMS architecture.

| D | Evaluation Criteria | Max Marks: |
|--------------|---|-------------------|
| 2 | Design sample (x 3) | 3 x 2 = 6 |
| 3 | Understanding about design best practices of Indian Government websites | 3 |
| 4 | User Experience | 3 |
| Total | | 12 |

E. Bidders' relevant key manpower capability (8 marks)

1. Details of roles, qualifications, experience, and job descriptions for the key resources are provided in [Section 11](#).
2. The following evaluation will be conducted on a percentage basis, with a maximum of 100 marks for the Bidder.
3. 8% (round off to 2 decimal points) of the total marks obtained by Bidder will be carried for determining final score.

| Sl. No | Role | No. of CVs that shall be evaluated | Min Experience (years) | Scoring Criteria for Relevant Experience | Max Score |
|---------------|-----------------------|---|-------------------------------|--|------------------|
| 1 | Project Manager | 1 | 10 | Min 10 ys: 5 marks 11 ys to 15 ys: 7 marks 15+ys: 10 marks | 10 |
| 2 | Lead Business Analyst | 1 | 5 | Min 5 ys: 2 marks 6 ys to 8 ys: 4 marks 8+ys: 6 marks | 6 |
| 3 | UI/UX Lead | 1 | 5 | Min 5 ys: 3 marks 6 ys to 8 ys: 6 marks 8+ys: 8 marks | 8 |
| 4 | Solution Architect | 1 | 10 | Min 10 ys: 5 marks 10 ys to 15 ys: 7 marks 15+ys: 10 marks | 10 |

| | | | | | |
|------------------------|-----------------------------------|---|----|--|------------|
| 5 | OEM: Solution Consultant / Expert | 1 | 10 | Min 10 ys: 5 marks 10 ys to 15 ys: 7 marks 15+ys: 10 marks | 10 |
| 6 | Cloud Specialist | 1 | 5 | Min 5 ys: 5 marks 6 ys to 8 ys: 7 marks 8+ys: 10 marks | 10 |
| 7 | Tech Lead/Project Lead | 1 | 8 | Min 8 ys: 5 marks 9 ys to 12 ys: 7 marks 12+ys: 10 marks | 10 |
| 8 | SEO Specialist | 1 | 3 | Min 3 ys: 2 marks 4 ys to 6 ys: 4 marks 6+ys: 6 marks | 6 |
| 9 | Cyber Security Expert | 1 | 7 | Min 7 ys: 5 marks 8 ys to 10 ys: 7 marks 10+ys: 10 marks | 10 |
| 10 | Lead QA | 1 | 3 | Min 3 ys: 2 marks 4 ys to 6 ys: 4 marks 6+ys: 6 marks | 6 |
| 11 | O& M Lead | 1 | 8 | Min 8 ys: 5 marks 9 ys to 12 ys: 7 marks 12+ys: 10 marks | 10 |
| 12 | Content Writer | 1 | 3 | Min 3 ys: 1 mark 4 ys to 6 ys: 3 marks 6+ys: 4 marks | 4 |
| Total Max Score | | | | | 100 |

Resumes of the key manpower nominated by bidder for this project needs to be submitted in the prescribed format as mentioned in [Annexure-XIV](#).

F. Client References (8 marks)

This section is to evaluate bidder's relevant experience of project engagement aligned to PFRDA's project requirements. To assess Bidder's Proven Relevant Experience, this evaluation will draw insights from two provided customer references where the bidder as SI has completed the project/s on or after 01-11-2019 till bid submissions end date of this RFP. Each reference will be scrutinized based on the following criteria:

| F Evaluation Criteria | Total Maximum Marks Awardable |
|-----------------------|-------------------------------|
| | |

| Client references of Relevant Experience | Marks awardable | Max. Marks Awardable | 8 (04 marks for each client) |
|--|-----------------|----------------------|------------------------------|
| F.1 (i) Client experience (For each project) | | 8 | |
| (a) Adherence to project deliverables as per RFP | 2 | | |
| (b) Project Governance Experience | 2 | | |
| Total | | 8 | |

** to fulfil this criteria bidder needs to showcase relevant experience for each project detail in the format given in [Annexure-X](#). PFRDA reserves the right to cross check & verify any/all of the submitted experiences & references via email, call, visit, ask for relevant Invoice submitted/ payment receipt with corresponding TDS certificate or any other possible modes, at PFRDA's discretion.

Annexure-VII: Manufacturer's Authorisation Form (MAF) by OEM

Indicative MAF as given below – all OEMs whose products are factored in the proposed solution needs to share their MAF acceptable to PFRDA/in the format as mentioned below.

[On the Letter head of OEM]

Date:

To,

Chief General Manager

In charge- PFRDA-Connect

Pension Fund Regulatory and Development Authority (PFRDA)

E-500, Tower E, 5th Floor, World Trade Centre, Nauroji Nagar, New Delhi-110 029

Dear Sir,

Ref.: Authorization letter from OEM to ----- (Bidder) for participation in bid for RFP
Reference No: PFRDA/2024/TARCH/PFRDA-Connect/01

| Particular | Original Supplier/make & model/development/Unit details |
|--|---|
| Software Licences including | |
| Core Solution | |
| <<Please insert details as required>> | |
| Other (Please insert other Components, as required) | |

1. We hereby extend our full guarantee and comprehensive warranty as per terms and conditions of the tender and the contract for our equipment quoted/services offered against this invitation for Bid by the above company/LLP.
2. We undertake to deliver the services as mentioned in the scope of work of RFP for OEM and hereby extend our warranty/support and services through M/s.....during the contract period as per terms and conditions of the RFP.
3. We also undertake that we are not under debarment/blacklist period for breach of contract/fraud/corrupt practices by any Regulatory bodies/ Scheduled Commercial

Banks/Public Sector Undertaking/State or Central Government or their agencies/departments as on date of submission of the bid.

4. The quoted product is of the latest model/version and extends our back-to-back support during the entire duration of Agreement. If any product is found to be obsolete/end of support/end of life during the contract period, we will replace the same with the latest product with the equivalent/higher capabilities for free of cost.

Dated at _____ this _____ day of _____ <YEAR>.

Yours faithfully,

[Signature of Authorised Representative of OEM/partner of OEM]

[Title] [Organization stamp/seal] [Date]

Annexure-VIII: Financial Bid

Date:

To,

Chief General Manager

In charge- PFRDA-Connect

Pension Fund Regulatory and Development Authority (PFRDA)

E-500, Tower E, 5th Floor, World Trade Centre, Nauroji Nagar, New Delhi-110 029

Subject: Submission of Proposal for Request for Proposal for Selection of System Integrator (SI) for Design, Development, Implementation and Maintenance of PFRDA Website (PFRDA-Connect): RFP no.- PFRDA/2024/TARCH/PFRDA-Connect/01, dated 6th November 2024.

Dear Sir,

1. Having examined the Bidding Documents, the receipt of which is hereby duly acknowledged, we, the undersigned, offer to design, develop, implement, and maintain the subject mentioned project, in conformity with the said Bidding documents.
2. If our Bid is accepted, we undertake to design, develop, implement, and maintain the project in accordance with the delivery schedule specified in this RFP.
3. If our Bid is accepted, we will obtain the guarantee of a bank issued by a Scheduled Commercial bank - in a sum equivalent to prescribed percent for the due performance of the Contract in the manner prescribed by PFRDA at [Appendix- II](#).
4. We agree to abide by the Bid and the rates quoted therein for the orders awarded by PFRDA up to the period prescribed in the Bid which shall remain binding upon us.
5. We undertake that, in competing for (and, if the award is made to us, in executing) the above contract, we will strictly observe the laws against fraud and corruption in force in India namely including but not limited to "Prevention of Corruption Act 1988".
6. We understand that you are not bound to accept any Bid you may receive.
7. Values in **Table 2** are Year wise details(break-up) of bid price for the purpose of record and reference only (to be matched with Total cost of Project (TCO)).

Detailed 'Financial Bid' with List of Products, Solutions, Services and Licences

Please mention 'Not Applicable'/NA wherever price is not quoted for the particular cell.

Table 1: Cost of Solution and Services

| S. no. | Phase & Tenure | Section | Item | Cost in INR (Excl GST) | Total Cost in INR Excl GST in words | Cost in INR (Incl GST) | Total Cost in INR Incl GST in words |
|---|---|--|--|------------------------|-------------------------------------|------------------------|-------------------------------------|
| A | Development [Duration is 6 months] | A.1 | Application Development Cost | | | | |
| | | A.2 | Security Audit & VAPT Cost | | | | |
| | | A.3 | Training Cost with Training Materials for CMS solution | | | | |
| | | A.4 | Any other cost (mention item details in subsequent rows) I II III | - | | - | |
| | | (A) Total Cost for Development Phase [6 months] | | | | | |
| B | License Cost | B.1 | License Cost for Development Phase | | | | |
| | | B.2 | License /Subscription Cost for Warranty & Stabilization Phase | | | | |
| | | B.3 | License /Subscription Cost for 1 st year AMC | | | | |
| | | B.4 | License /Subscription Cost for 2 nd year AMC | | | | |
| | | B.5 | License /Subscription Cost for 3 rd year AMC | | | | |
| | | B.6 | License /Subscription Cost for 4 th year AMC | | | | |
| (B) Total Cost for License Cost | | | | | | | |
| C | Warranty & Stabilization Phase [Duration is 6 months] | C.1 | Cloud Cost | | | | |
| | | C.2 | Technical Helpdesk | | | | |
| | | C.3 | Facility Management cost including manpower | | | | |
| | | C.4 | Warranty & Stabilization cost for 6 months | | | | |
| | | C.5 | Any other cost (mention item details in subsequent rows) I II III | | | | |
| (C) Total Cost for Warranty & Stabilization Phase [6 months] | | | | | | | |
| D | AMC Year 1 | D.1 | Cloud Cost | | | | |
| | | D.2 | Technical Helpdesk | | | | |
| | | D.3 | AMC cost | | | | |
| | | D.4 | Any other cost (mention item details in subsequent rows) | | | | |

| S. no. | Phase & Tenure | Section | Item | Cost in INR (Excl GST) | Total Cost in INR Excl GST in words | Cost in INR (Incl GST) | Total Cost in INR Incl GST in words |
|---|---|---------|---|------------------------|-------------------------------------|------------------------|-------------------------------------|
| | | | I II III..... | | | | |
| (D) Total Cost for first year AMC | | | | | | | |
| E | AMC Year 2 | E.1 | Cloud Cost | | | | |
| | | E.2 | Technical Helpdesk | | | | |
| | | E.3 | AMC cost | | | | |
| | | E.4 | Any other cost (mention item details in subsequent rows) I II III.... | | | | |
| (E) Total Cost for second year AMC | | | | | | | |
| F | AMC Year 3 | F.1 | Cloud Cost | | | | |
| | | F.2 | Technical Helpdesk | | | | |
| | | F.3 | AMC cost | | | | |
| | | F.4 | Any other cost (mention item details in subsequent rows) I II III.... | | | | |
| (F) Total Cost for third year AMC | | | | | | | |
| G | AMC Year 4 | G.1 | Cloud Cost | | | | |
| | | G.2 | Technical Helpdesk | | | | |
| | | G.3 | AMC cost | | | | |
| | | G.4 | Any other cost (mention item details in subsequent rows) I II III..... | | | | |
| (G) Total Cost for fourth year AMC | | | | | | | |
| H | (H) Total cost 50-man days of change request | | | | | | |
| I | I = (D + E + F + G) Total Cost for AMC Phase | | | | | | |
| TCO | TCO = (A + B + C + H + I) Total Project Cost (Development Phase + Warranty & Stabilization Phase + AMC Phase + 50-man days cost) <i>Bid will be evaluated on TCO - exclusive of GST</i> | | | | | | |

Table-2: Year wise details (break-up) of Price bid/Financial bid

| Sr. no. | Particulars | Year | Cost (in Rs.) exclusive of GST as applicable | GST as applicable | Cost (in Rs.) inclusive of GST as applicable |
|--|------------------------------|------|--|----------------------|--|
| 1 | Project Cost | 1 | | | |
| 2 | Project Cost | 2 | | | |
| 3 | Project Cost | 3 | | | |
| 4 | Project Cost | 4 | | | |
| 5 | Project Cost | 5 | | | |
| 6 | Change request man days cost | - | | | |
| Total Project Cost (Add sr. no. 1 to 6) to be matched with TCO as bid Financial quoted in Table-1 | | | Total of sr. no. 1 to 6 exclusives of GST In figure: Rs _____ In words: Rs. _____ | | Total of sr. no. 1 to 6 inclusive of GST In figure: Rs. _____ In words: Rs. _____ |

(Signature)

(Name) (in the capacity of)

Duly authorised to sign Bid for and on behalf of

Company Seal

Yours faithfully,

[Signature of Authorised Representative of SI]

[Title]

[Organization stamp/seal]

[Date]

Annexure-IX: Payment Milestones

A. Delivery Schedule

- The total duration for the project will be of **Five (05) years** from the date of the award of the contract comprising of **One (01) month** of (Requirement Gathering, Project Plan development, Design and Architecture Blueprint), **Three (03) months** of development (Enterprise-grade CMS Implementation, Website Design and Development, UI/UX Enhancement, Data & Content Migration, Security and Compliance Integration), **Two (02) months** for testing & go-live (Functional Testing, UI/UX Testing, Security and Compliance Testing, Performance and Load Testing, Final Review and Approval, Production Environment Setup, Go-live), **Six (06) months** of warranty & stabilisation from the date of Go-live and AMC for **Forty-Eight (48) month** from the date of end of warranty.

B. Payment Terms

The payment will be made within 30 days on receipt of proper invoice (original) against successfully completion of the services as per the timeline indicated. If any of the milestones are completed earlier than the timelines, PFRDA may consider to release payment earlier.

| Sl. No | Payment Milestones | % Payment | Payment Timelines |
|--|--|--|------------------------------------|
| (A) Development phase [6 months] (payment will be % of the cost quoted for development of the application phase as quoted in Annexure-VIII for the section "Financial Bid" in section "A" mentioned as - Total Cost for Development Phase) | | | |
| 1 | Project Charter, Project Plan, System study, migration plan, UI / UX design document, technical architecture (solution, network etc), FRS &SRS and its acceptance by PFRDA | 20 | After 1 month of contract signing |
| 2 | UAT Signoff and its acceptance by PFRDA | 30 | After 4 months of contract signing |
| 3 | Training to PFRDA & submission of training material | 5 | Whenever applicable |
| 4 | Security audit & VAPT and its acceptance by PFRDA (from CERT-IN empanelled agency) | 20 | After 5 months of contract signing |
| 5 | Implementation/Go live and its acceptance by PFRDA | 25 | After 6 months of contract signing |
| (B) License Cost | | | |
| 1 | License Cost for Development Phase | • 50% - upon procurement, delivery, installation | Whenever applicable |

| Sl. No | Payment Milestones | % Payment | Payment Timelines |
|--|---|---|---|
| | | and submission of necessary documents | |
| | | <ul style="list-style-type: none"> • 40% - upon UAT sign-off • 10% - upon Go-live | |
| 2 | License/ Subscription Cost for Warranty & Stabilization Phase | 100% | After Go-live acceptance |
| 3 | License /Subscription Cost for 1st year AMC | 100% License /Subscription Cost for Y1 | Start of year 1 AMC |
| 4 | License /Subscription Cost for 2nd year AMC | 100% License /Subscription Cost for Y2 | Start of Year 2 AMC |
| 5 | License /Subscription Cost for 3rd year AMC | 100% License /Subscription Cost for Y3 | Start of Year 3 AMC |
| 6 | License /Subscription Cost for 4th year AMC | 100% License /Subscription Cost for Y4 | Start of Year 4 AMC |
| (C) Warranty & stabilization [6 months] | | | |
| 1 | Warranty & Stabilization Phase cost for 6 months (every 3 months after Go-live) | 50% of C.4 of Annexure-VIII Section C | To be billed 50% every three months after Go-live |
| 2 | Cloud Cost | 50% of C.1 of Annexure-VIII Section C | To be billed 50% every three months after Go-live |
| 3 | Technical Help Desk | 50% of C.2 of Annexure-VIII Section C | To be billed 50% every three months after Go-live |
| 4 | Facility Management | 50% of C.3 of Annexure-VIII Section C | To be billed 50% every three months after Go-live |
| 5 | Any other cost | 50% of C.5 of Annexure-VIII Section C | To be billed 50% every three months after Go-live |
| (D) Total Cost for 4 years AMC [48 months] | | | |
| YEAR 2 | | | |
| 1 | AMC Year 1 | 25% of D.3 of Annexure-VIII Section D | To be billed 25% every quarter for Year 2 |
| 2 | Technical Help desk | 25% of D.2 of Annexure-VIII Section D | To be billed 25% every quarter for Year 2 |
| 3 | Cloud Cost | 25% of D.1 of Annexure-VIII of Section D | To be billed 25% every quarter for Year 2 |
| 4 | Any other cost | 25% of D.5 of Annexure-VIII Section D | To be billed 25% every quarter for Year 2 |
| YEAR 3 | | | |

| Sl. No | Payment Milestones | % Payment | Payment Timelines |
|---|--|--|---|
| 1 | AMC Year 2 | 25% of E.4 of Annexure-VIII Section E | To be billed 25% every quarter for Year 3 |
| 2 | Technical Help desk | 25% of E.2 of Annexure-VIII Section E | To be billed 25% every quarter for Year 3 |
| 3 | Cloud Cost | 25% of E.1 of Annexure-VIII Section E | To be billed 25% every quarter for Year 3 |
| 4 | Any other cost | 25% of E.5 of Annexure-VIII Section E | To be billed 25% every quarter for Year 3 |
| YEAR 4 | | | |
| 1 | AMC Year 3 | 25% of F.4 of Annexure-VIII Section F | To be billed 25% every quarter for Year 4 |
| 2 | Technical Help desk | 25% of F.2 of Annexure-VIII Section F | To be billed 25% every quarter for Year 4 |
| 3 | Cloud Cost | 25% of F.1 of Annexure-VIII Section F | To be billed 25% every quarter for Year 4 |
| 4 | Any other cost | 25% of F.5 of Annexure-VIII Section F | To be billed 25% every quarter for Year 4 |
| YEAR 5 | | | |
| 1 | AMC Year 4 | 25% of G.4 of Annexure-VIII Section G | To be billed 25% every quarter for Year 5 |
| 2 | Technical Help desk | 25% of G.2 of Annexure-VIII Section G | To be billed 25% every quarter for Year 5 |
| 3 | Cloud Cost | 25% of G.1 of Annexure-VIII Section G | To be billed 25% every quarter for Year 5 |
| 4 | Any other cost | 25% of G.5 of Annexure-VIII of Section G | To be billed 25% every quarter for Year 5 |
| (H) Total cost 50 (Fifty) man days of change request | | | |
| 1 | Bidder should quote 50 (fifty) man-days as a contingency for Change Requests (CR) over the project's tenure in the Financial Bid this in section H. However it can be invoiced to PFRDA on an actual basis. This should align with the bidder's quote in Annexure-VIII , under the "Financial Bid" section H, in labeled as "50-man days of change request " | | Whenever applicable |

Name & Signature of authorized signatory

Seal of Company

Annexure-X: Project Details and Client References

To whomsoever it may concern

Please fill details for each project:

| Particulars | Details |
|--|----------------|
| Client Information | |
| Client Name | |
| Client address | |
| Name of the contact person and designation | |
| Phone number of the contact person | |
| e-mail address of the contact person | |
| Project Details | |
| Name of the Project | |
| Project Relevant Scope | |
| Project Technology Stack | |
| Use cases relevant to PFRDA requirements in brief | |
| Project duration (phase wise details, if any) | |
| Start Date | |
| End Date | |
| Current Status Completion Certificate from client (preferable), in case of project completed (Go Live) | |
| Whether AMC of the project's ownership is also with same SI | |
| Project hosted on | |
| Size of Project | |
| Value of Work Order (In Lakhs) (only single workorder) | |
| Location(s) where the project implemented | |
| No of Users | |
| Any other information | |

Name & Signature of authorized signatory
Seal of Company

Annexure-XI: Authorization by CSP

Sample format for CSP. Bid specific satisfactory MAF by CSP will also be accepted. It should mention that this would be valid for entire project duration.

[On the Letter head of CSP]

To,

Chief General Manager
In charge- PFRDA-Connect
Pension Fund Regulatory and Development Authority(PFRDA)
E-500, Tower E, 5th Floor, World Trade Centre, Nauroji Nagar, New Delhi-110 029

Subject: Submission of Proposal for Request for Proposal for Selection of System Integrator (SI) for Design, Development, Implementation and Maintenance of PFRDA-Connect (Website): RFP no.- PFRDA/2024/TARCH/PFRDA-Connect/01, dated 6th November 2024.

Dear Sir,

Ref.: Authorization letter from CSP to ----- (Bidder) for participation in bid for RFP Reference No: PFRDA/2024/TARCH/PFRDA-Connect/01, dated 6th November 2024.

| Particular | Make & model/development/Unit details |
|--|---------------------------------------|
| Cloud specifications and details | |
| <<Please insert details as required>> | |
| Other (Please insert other Components, as required) | |

1. We hereby confirm our participation as CSP against this invitation for Bid by the above company/LLP.
2. We undertake to perform the requirements as set out in the RFP in respect of such services as mentioned in scope of work for cloud and hereby extend our services through M/s.....during the contract period as per terms and conditions of the RFP.
3. We are MEITY empanelled CSP for VPC services and we hereby attach copy of our empanelment letter from MEITY.
4. We undertake that we have not been blacklisted by the Government Authority or Public Sector Undertaking (PSUs) in India or any Financial Institution in India as on date of submission of response.



Enclosed: Letter of Empanelment from MEITY

Dated at _____ this _____ day of _____ <YEAR>.

Yours faithfully,

Name & Signature of authorized signatory

Seal of Company

[Signature of Authorized Representative of CSP] [Title] [Organization stamp/seal] [Date]

Annexure-XII: Checklist of Documents to Be Submitted

| S. No. | Documents to be submitted | Submitted (Y/N) | Documentary Proof (Page No.) |
|--------|--|-----------------|------------------------------|
| 1. | Bid processing fee in the form of Account Payee Demand Draft. In case of online payment, receipt / acknowledgment of the bid processing fee. | | |
| 2. | Earnest Money Deposit (EMD) in the form of Bank Guarantee. | | |
| 3. | Integrity Pact (on Rs. One hundred (100) stamp paper) – Appendix III | | |
| 4. | Technical proposal as per the RFP requirements | | |
| 5. | Proposal Submission Covering Letter Annexure-I | | |
| 6. | Bidder details as per Annexure-II | | |
| 7. | Financial Capability Statement as per Annexure-III | | |
| 8. | Certificate of incorporation/ Copy of Certificate of Registration/LLP Registration | | |
| 9. | GST Registration Certificate | | |
| 10. | Power of attorney/board resolution to the authorized Signatory | | |
| 11. | Work order(s), completion certificates | | |
| 12. | Project details and Client references as per Annexure- X | | |
| 13. | Valid CMMi level 3 Certificate or above | | |
| 14. | Valid MEITY empaneled certificate from Cloud Service Provider | | |
| 15. | Project Team structure with Resume of Key personnel as per Annexure - XIV | | |
| 16. | Audited financial statement for financial years (i.e. FY 2023-24, FY 2022-23, FY 2021-22) | | |
| 17. | Certification (MAF) from OEM as per Annexure-VII | | |

| S. No. | Documents to be submitted | Submitted (Y/N) | Documentary Proof (Page No.) |
|--------|---|-----------------|------------------------------|
| 18. | Financial bid as per Annexure-VIII | | |
| 19. | Certification from CSP as per Annexure-XI | | |
| 20. | Cloud Port Out Plan | | |
| 21. | Change Request as per Annexure-XIII | | |
| 22. | Resume of Team as per Annexure-XIV | | |
| 23. | Bill of Material for Licensed products & any other services used as per Annexure-XV | | |
| 24. | Certificate of not Blacklisted as per Annexure XVI | | |

Name & Signature of authorized signatory

Seal of Company

Annexure-XIII Change Request

PFRDA may consider utilising the services of bidder to implement additional Services that are not part of the scope of this RFP on time and material basis/man days rate basis. Bidders are requested to provide a man days rate option. It may be noted that PFRDA will invoke these rates for any further Change Requests once the efforts under man days as quoted in Man days bundle in this RFP have been exhausted. The man-days rate will be applicable for the entire project duration.

| Sl. No | Resource/Services (Min 5 years of exp) | Man-day Rate (in INR) |
|--------|---|-----------------------|
| 1 | Developers | |
| 2 | Mobile Application Developer | |
| 3 | UI/UX Designer | |
| 4 | Quality Assurance/Test Engineer | |
| 5 | Technical Document/Content Writer | |
| 6 | System and Database Operations Engineer | |
| 7 | Networking Operations Engineer | |
| 8 | Training and Change Management Engineer | |
| 9 | Information Security Engineer | |
| 10 | Data Science/Analytics Engineer | |
| 11 | Security Auditor | |
| 12 | Any similar nature of works comparable to the above | |

Name & Signature of authorized signatory

Seal of Company

Annexure-XIV: Resume Format

Proposed Role:

| Sl. No | Section | |
|--------|--|---|
| 1 | Personal Details | |
| 1.1 | Name | [Insert Name] |
| 1.2 | Designation | [Insert Designation] |
| 1.3 | Highest Qualification | [Insert Highest Qualification] |
| 1.4 | Relevant Professional Certifications/ Memberships | [Insert Certifications/Memberships] |
| 1.5 | Professional Experience | |
| 1.6 | Total Experience | [Insert Total Experience in Years] |
| 1.7 | Relevant Experience | [Insert Relevant Experience in Years] |
| 2 | Project Experience | |
| 2.1 | Project 1 | |
| 2.1.a | Name of Assignment or Project | [Insert Project Name] |
| 2.1.b | Duration (From – To) | [Insert Duration] |
| 2.1.c | Location | [Insert Location] |
| 2.1.d | Client Name | [Insert Client Name] |
| 2.1.e | Scope of Work | [Provide a brief description of the project's scope] |
| 2.1.f | Role | [Insert Role] |
| 2.1.g | Activities Performed | [List key activities and responsibilities in the project] |
| 2.2 | Project 2 | |
| 2.2.a | Name of Assignment or Project | [Insert Project Name] |
| 2.2.b | Duration (From – To) | [Insert Duration] |
| 2.2.c | Location | [Insert Location] |
| 2.2.d | Client Name | [Insert Client Name] |
| 2.2.e | Scope of Work | [Provide a brief description of the project's scope] |
| 2.2.f | Role | [Insert Role] |
| 2.2.g | Activities Performed | [List key activities and responsibilities in the project] |
| | <i>(Add more projects as needed)</i> | |
| 3 | Experience in Proposed Tools, Technology, Solution, Methodology, Nature of Work | |
| 3.1 | Tools and Technology | [List tools and technologies you have experience with] |
| 3.2 | Solutions Implemented | [Describe solutions you have worked on, focusing on relevance to the proposed role] |
| 3.3 | Methodologies Used | [Mention any specific methodologies or frameworks you are proficient in] |
| 3.4 | Nature of Work | [Detail the type of work performed, such as design, implementation, testing, etc.] |

Name & Signature of authorized signatory

Seal of Company

Annexure-XV: Bill of Material for Licensed products & any other services used

All licensed products which are recommended in the architecture should be included in this table.

| S. no | Product Name | Qty. | Vendor | License Type | Usage Notes |
|--------------|---------------------|-------------|---------------|---------------------|--------------------|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Name & Signature of authorized signatory

Seal of Company

Annexure-XVI: Certificate of not Blacklisted

[On Company Letter-head]

Date: [DD/MM/YYYY]

Place: _____

To whom it may concern

This is to certify that we , [Name of the Company], having our registered office at [Address], is not currently under debarment/blacklist period for breach of contract/fraud/corrupt practices by any Regulatory bodies/ Scheduled Commercial Banks/Public Sector Undertaking/State or Central Government or their agencies/departments as on date of submission of the bid.

This certification is issued upon the request of PFRDA for the purpose of participating in the tender process for Selection of System Integrator (SI) for Design, Development, Implementation and Maintenance of PFRDA-Connect (Website): RFP no.- PFRDA/2024/TARCH/PFRDA-Connect/01, dated 6th November 2024.

(Authorised Signatory)

Signature:

Name:

Designation:

Seal:

Date:

Appendix I: Format for EMD

To,

Chief General Manager (In charge- PFRDA-Connect)
Pension Fund Regulatory and Development Authority (PFRDA)
E-500, Tower E, 5th Floor,
World Trade Centre, Nauroji Nagar,
New Delhi-110 029

Earnest Money Deposit for Request for Proposal for Selection of System Integrator (SI) for Design, Development, Implementation and Maintenance of PFRDA-Connect (Website): RFP no.- PFRDA/2024/TARCH/PFRDA-Connect/01, dated 6th November 2024.

1. WHEREAS Pension Fund Regulatory and Development Authority (PFRDA), having its Office at E-500, Tower E, 5th Floor, World Trade Centre, Nauroji Nagar, New Delhi 110029 has invited Request for Proposal to Design, Development, Implementation and Maintenance of PFRDA-Website (PFRDA -Connect) as set out in the Request for Proposal RFP no. PFRDA/2024/TARCH/PFRDA-Connect/01, dated 6th November 2024.
2. It is one of the terms of the said RFP that the bidder shall furnish a bank guarantee for a sum of Rs 20,00,000 (Rupees Twenty Lakhs only) as Earnest Money Deposit.
3. M/s. [Name of the Bidder] (hereinafter called as Bidder), who are our constituents, intends to submit their Bid for the said work and have requested us to furnish guarantee in respect of the said of Rs 20,00,000 (Rupees Twenty Lakhs only)
4. We, [Name of the Bank], having our registered office at [Address] (hereinafter referred to as 'the Bank'), hereby irrevocably and unconditionally bind ourselves to the Pension Fund Regulatory and Development Authority (PFRDA) (hereinafter referred to as 'the Purchaser'), in the sum of INR 20,00,000 (Rupees Twenty Lakhs only), for the payment of which the Bank binds itself, its successors, and assigns by these presents, sealed with the Common Seal of the Bank on this [Date].
5. The conditions of this obligation are:
 - a. If the Bidder withdraws the proposal or increases the quoted prices after opening of the Proposal and during the Bid validity period or its extended period, if any.
 - b. In case of a successful Bidder, if the Bidder fails to sign the Agreement in accordance with the terms and conditions (including timelines for execution of the Agreement) of this RFP or fails to furnish the Performance Bank Guarantee in accordance with the terms and conditions (including timelines for furnishing PBG) of this RFP.
 - c. If the bidder is found indulging in any corrupt, fraudulent or other malpractice in respect of the bid
6. We undertake to pay to the Purchaser up to the above amount upon receipt of its first written demand, without the Purchaser having to substantiate its demand, provided

that in its demand the Purchaser will note that the amount claimed by it is due to it owing to the occurrence of the conditions mentioned above and specifying the occurred condition or conditions.

7. This guarantee will remain in force up to [insert date] and including [extra time over and above mandated in the RFP] from the last date of submission and any demand in respect thereof should reach the Bank not later than the above date.

NOTWITHSTANDING ANYTHING CONTAINED HEREIN:

8. Our liability under this Bank Guarantee shall not exceed Rs. [Amount in figures] (Rupees [Amount in words] only)
9. This Bank Guarantee shall be valid up to [insert date]
10. It is condition of our liability for payment of the guaranteed amount or any part thereof arising under this Bank Guarantee that we receive a valid written claim or demand for payment under this Bank Guarantee on or before [insert date] failing which our liability under the guarantee will automatically cease.

(Authorized Signatory of the Bank)

Seal:

Date:

(Note: This guarantee will require stamp duty and shall be signed by the official(s) whose signature and authority shall be verified)

Appendix-II: PBG Format for Performance Security (Indicative)

(TO BE STAMPED AS AN AGREEMENT)

Performance bank guarantee as performance security for System Integrator (SI) for Design, Development, Implementation and Maintenance of PFRDA-Connect (Website):

RFP no.- PFRDA/2024/TARCH/PFRDA-Connect/01, dated 6th November 2024

(Performa of Performance Bank Guarantee)

To,

Chief General Manager

In charge- PFRDA-Connect

Pension Fund Regulatory and Development Authority(PFRDA)

E-500, Tower E, 5th Floor, World Trade Centre, Nauroji Nagar, New Delhi-110 029

Subject: Performance Bank Guarantee No. _____ for INR _____ executed on _____ at _____ by [Name of the Bank], having its Head/Registered Office at [Bank's Address], hereinafter referred to as "the Guarantor," which expression shall, unless repugnant to the subject or context thereof, include its successors and assigns.

In favour of:

Pension Fund Regulatory and Development Authority (PFRDA), hereinafter referred to as "PFRDA," which expression shall, unless repugnant to the context or meaning thereof, include its administrators, successors, or assigns.

Whereas

1. **The Agreement** ("AGREEMENT") is being executed between PFRDA and [Name of the Successful Bidder], a company incorporated under the provisions of the Companies Act, 2013/ Limited Liability Partnership firm registered under the Limited Liability Partnerships Act, 2008, having its registered office at [Address of the Bidder], as the Successful Bidder for the System Implementation at PFRDA (hereinafter referred to as "the Project").
2. **The Letter of Intent (LOI) dated _____ issued by PFRDA has been accepted by [Name of the Successful Bidder] on [date] .**
3. As per the terms of the RFP, the Selected Bidder is required to furnish PFRDA with an unconditional and irrevocable Performance Security in the amount of INR _____, to secure due and punctual performance and discharge of its

obligations under the Agreement related to the design, development, and operation of the system.

4. At the request of the Selected Bidder, the Guarantor has agreed to furnish this Performance Security, guaranteeing the due and punctual performance/discharge by the SI of its obligations related to the Project.

Now, Therefore, This Deed Witnesseth as Follows:

1. All capitalized terms used herein but not defined shall have the meanings assigned to them in the Agreement.
2. The Guarantor hereby irrevocably guarantees the due and punctual performance by [Name of the Selected Bidder] (hereinafter referred to as "the Selected Bidder") of all its obligations related to the Project, including but not limited to the design, development, and operation of the software application, in accordance with the Agreement.
3. The Guarantor shall, without any demur or protest, pay to PFRDA a sum not exceeding in aggregate INR _____ within ten (10) calendar days of receiving a written demand from PFRDA stating that the Selected Bidder has failed to meet its obligations under the Agreement.
4. The Guarantor shall not question the validity of any breach or failure on the part of the Selected Bidder or the legitimacy of any demand made by PFRDA and shall pay the amount specified in the demand, notwithstanding any direction to the contrary or any dispute raised by the Selected Bidder or any other person. The obligations of the Guarantor shall subsist until all such demands are duly met and discharged in accordance with the provisions hereof.
5. In order to give effect to this Guarantee, PFRDA shall be entitled to treat the Guarantor as the principal debtor. The obligations of the Guarantor shall not be affected by any variations in the terms and conditions of the Agreement or other documents, any extension of time for performance granted to the Selected Bidder, any postponement/non-exercise/delayed exercise of any rights by PFRDA, or any indulgence shown by PFRDA to the Selected Bidder. The Guarantor shall not be relieved of its obligations under this Guarantee on account of any such variation, extension, postponement, non-exercise, delayed exercise, or indulgence shown, provided nothing contained herein shall enlarge the Guarantor's obligations under this Guarantee.
6. This Guarantee shall be irrevocable and shall remain in full force and effect until _____ (at least 180 days after the completion of the contract tenure, including AMC), unless discharged or released earlier by PFRDA in accordance with the provisions of the Agreement. The Guarantor's liability in aggregate shall be limited to a sum of INR _____.
7. This Guarantee shall not be affected by any change in the constitution or winding up of the Selected Bidder or the Guarantor or any absorption, merger, or amalgamation of the Selected Bidder or the Guarantor with any other entity.
8. The Guarantor represents and warrants that it has the power to issue this Guarantee and discharge the obligations contemplated herein, and that the undersigned is duly

authorized to execute this Guarantee pursuant to the powers granted under _____.

9. This Guarantee shall be governed by Indian laws, and the Courts of Delhi, India shall have exclusive jurisdiction to entertain any disputes arising out of this Guarantee.
10. No claim under this Guarantee shall be entertained by the Guarantor unless such claim is preferred by the Pension Fund Regulatory and Development Authority (PFRDA) on or before the expiry date of this Guarantee.
11. We hereby confirm that we have the authority to issue this Guarantee in your favor under the Constitution and business procedure of our Bank, and that the undersigned has full power to execute this Performance Bank Guarantee in your favour under the Power of Attorney issued by the Bank.

Notwithstanding anything contained herein:

- a. Our liability under this Guarantee shall not exceed INR _____.
- b. This Guarantee shall not be revoked during its currency, except with the prior written consent of Pension Fund Regulatory and Development Authority (PFRDA).
- c. We shall be liable to pay the guaranteed amount or any part thereof under this Bank Guarantee only if a written demand is served upon us on or before the expiry of this Guarantee.

All claims under the guarantee will be payable at New Delhi.

This guarantee will be returned to us as soon as the purpose for which it is issued is fulfilled.

Date _____

Place _____

Witness _____

(Bank's common seal)

Appendix III: Integrity Pact

(To Be Stamped as an Agreement)

Integrity Pact

Between

Pension Fund Regulatory and Development Authority (PFRDA)

[A Statutory Body Established under the PFRDA Act, 2013]

(Hereinafter Referred to as "The Buyer")

And

.....
(Hereinafter Referred to as "The Bidder/Contractor")

Preamble

The Buyer intends to award, following its established organizational procedures, contracts for [Specify Nature of Contract]. The Buyer is committed to ensuring full compliance with all relevant laws, rules, regulations, and the principles of economic resource utilization, fairness, and transparency in its dealings with the Bidder(s) and/or Contractor(s).

For PFRDA, the Independent External Monitors (IEMs) appointed are:

1. **Shri Deepak Kashyap, IRTS (Retd.)**
1162, ATS Tourmaline, Dwarka Expressway, Gurugram – 122017
Email: deepakkashyapnd02@gmail.com
2. **Shri Harishwar Dayal, IDSE (Retd.)**
H-2, Lawyers Colony, Bypass Road,
Agra - 282 005 (UP)
Email: dayalagra@gmail.com

I. Commitments of the Buyer

The Buyer commits itself to take all necessary measures to prevent corruption and to adhere to the following principles:

1. No employee of the Buyer, either personally or through family members, will demand, take a promise for, or accept, any material or other benefits, which they are not legally entitled to, in connection with the tender process or the execution of the contract.
2. The Buyer will treat all Bidder(s) equitably and fairly during the tender process. The Buyer will provide the same information to all Bidder(s) and will not provide any confidential/additional information that could give an unfair advantage to any Bidder(s) during the tender process or contract execution.

3. The Buyer will exclude from the process all individuals known to have any prejudice or bias.
4. If the Buyer becomes aware of conduct by any of its employees that is an offence under the Bhartiya Nyaya Sanhita /Prevention of Corruption (PC) Act, or if there is a reasonable suspicion thereof, the Buyer will inform the Chief Vigilance Officer (CVO) and may also initiate disciplinary action.

II. Commitments of the Bidder(s)/Contractor(s)

The Bidder(s)/Contractor(s) commit themselves to take all necessary measures to prevent corruption and to adhere to the following principles during their participation in the tender process and during the execution of the contract:

1. The Bidder(s)/Contractor(s) will not, directly or through any other person or firm, offer, promise, or give any material or other benefit, which they are not legally entitled to, to any employee of the Buyer involved in the tender process or the execution of the contract, or to any third person, in order to obtain any advantage during the tender process or contract execution.
2. The Bidder(s)/Contractor(s) will not enter into any undisclosed agreement or understanding, whether formal or informal, with other Bidder(s). This includes agreements on prices, specifications, certifications, subsidiary contracts, submission or non-submission of bids, or any other action that could restrict competitiveness or lead to cartelization in the bidding process.
3. The Bidder(s)/Contractor(s) will not commit any offence under the Bhartiya Nyaya Sanhita /PC Act and will not misuse or pass on to others any information or document provided by the Buyer, which may be used for competitive or personal gain.
4. Bidder(s)/Contractor(s) of foreign origin shall disclose the name and address of their agents/representatives in India, if any. Similarly, Bidder(s)/Contractor(s) of Indian nationality shall disclose the name and address of any foreign principals. All payments made to the Indian agent/representative must be in Indian Rupees, as per the “Guidelines on Indian Agents of Foreign Suppliers.”
5. The Bidder(s)/Contractor(s), while submitting their bid, shall disclose any payments made or committed to be made to agents, brokers, or any other intermediaries in connection with the award of the contract.
6. The Bidder(s)/Contractor(s) who have signed this Integrity Pact shall not approach the courts before representing the matter to the IEMs and shall wait for their decision.

III. Disqualification from Tender Process and Exclusion from Future Contracts

If the Bidder(s)/Contractor(s), before the award or during execution, has committed a transgression by violating Clause II or in any other manner that puts their reliability or credibility in question, the Buyer is entitled to disqualify the Bidder(s)/Contractor(s) from the tender process or exclude them from future contracts for a period of three (03) years. The firm may also be banned from all future business dealings with the Buyer.

IV. Compensation for Damages

1. If the Buyer has disqualified the Bidder(s) from the tender process prior to the award as per Clause III, the Buyer is entitled to recover damages equivalent to the Earnest Money Deposit (EMD) or Bid Security.

2. If the Buyer has terminated the contract according to Clause III, or is entitled to terminate the contract, the Buyer shall be entitled to demand and recover from the Contractor any compensation as provided under the contract, in addition to damages.

V. Previous Transgression

The Bidder declares that no previous transgressions have occurred in the last three years with any other company in any country that conforms to the anti-corruption approach or with any Central/State Government Organization, Central/State Autonomous Body, Regulatory Body, Public Sector Enterprise/Undertaking in India that would justify exclusion from the tender process.

If the Bidder makes an incorrect statement on this subject, they can be disqualified from the tender process without any notice or explanation.

VI. Equal Treatment of All Bidders/Contractors

1. The Buyer will enter into agreements with identical conditions as this one with all Bidders and Contractors.
2. The Buyer will disqualify from the tender process any Bidder who does not sign this Pact or violates its provisions.

VII. Criminal Charges Against Violating Bidder(s)/Contractor(s)

If the Buyer becomes aware of the conduct of a Bidder, Contractor, or Subcontractor, or of an employee or representative of a Bidder, Contractor, or Subcontractor, that constitutes corruption, or if there is a substantive suspicion thereof, the Buyer will inform the Chief Vigilance Officer.

VIII. Independent External Monitor

1. The Buyer has appointed competent and credible Independent External Monitors (IEMs) for this Pact after approval by the Central Vigilance Commission (CVC). The task of the Monitor is to independently and objectively review whether the parties comply with the obligations under this agreement.
2. The Monitor is not subject to instructions from the representatives of the parties and performs their functions neutrally and independently. The Monitor shall have access to all contract documents whenever required and is obligated to treat all information and documents of the Bidder(s)/Contractor(s) as confidential. The Monitor reports to the Chairperson, PFRDA.
3. The Bidder(s)/Contractor(s) accept that the Monitor has the right to access, without restriction, all project documentation of the Buyer, including that provided by the Contractor. The Contractor will also grant the Monitor, upon their request, unrestricted and unconditional access to their project documentation. The Monitor is under a contractual obligation to treat all information and documents with confidentiality.
4. In case of any conflict of interest arising at a later date, the IEM shall inform the Chairperson, PFRDA and recuse themselves from that case.
5. The Buyer will provide sufficient information to the Monitor about all meetings related to the Project that could impact the contractual relations between the Buyer and the Contractor. The parties offer the Monitor the option to participate in such meetings.
6. As soon as the Monitor notices, or believes to notice, a violation of this agreement, they will inform the Management of the Buyer and request them to take corrective

action. The Monitor can submit non-binding recommendations in this regard. The Monitor does not have the right to demand specific actions from the parties.

7. The Monitor will submit a written report to the Chairperson, PFRDA within 8 to 10 weeks from the date of reference or intimation to them by the Buyer. If the Monitor identifies a substantive suspicion of an offence under the IPC/PC Act and the Chairperson, PFRDA does not take visible action within a reasonable time, the Monitor may transmit this information directly to the Central Vigilance Commissioner.
8. The term 'Monitor' includes both singular and plural.

IX. Pact Duration

1. This Pact begins when both parties have legally signed it. It expires for the Contractor 180 days after the last payment under the contract and for all other Bidders 180 days after the contract has been awarded to the successful bidder.
2. Any violation of this Pact will lead to the disqualification of the Bidder(s) and exclusion from future business dealings. If any claim is lodged during this period, the same shall be binding and continue to be valid despite the lapse of this Pact unless it is discharged or determined by the Chairperson of PFRDA.

X. Other Provisions

1. This agreement is subject to Indian Law. Place of performance and jurisdiction is the Registered Office of the Buyer, i.e. Delhi.
2. Changes and supplements as well as termination notices need to be made in writing. Side agreements have not been made.
3. Should one or several provisions of this agreement turn out to be invalid, the remainder of this agreement remains valid. In this case, the parties will strive to come to an agreement to their original intentions.
4. Issues like Warranty/Guarantee etc. shall be outside the purview of IEMs.
5. Bidder(s) shall not approach the courts while representing the matters to IEMs and he/she will await their decision in the manner.

| Buyer | Bidder |
|-----------------|--|
| Name of Officer | Chief Executive Officer/ Authorized Representative of Bidder |
| Designation | |
| PFRDA | |

| WITNESS | WITNESS |
|----------------|----------------|
| 1. | 1. |
| 2. | 2. |

Appendix IV: Indicative SLA and LDs/Compensation

This document outlines the Service Level Agreement (SLA) standards and associated liquidated damages for the PFRDA-Connect project. The SLA defines the quality, timeliness, and performance expectations from the System Integrator (SI) across different phases of the project: **Development Phase, Warranty & Stabilization Phase, and Operation & Maintenance (O&M) Phase.**

1. Purpose of this Agreement

The purpose of this SLA is to:

- Define clear service level standards in terms of quality and timelines for the SI.
- Ensure the SI delivers the agreed-upon service levels consistently.
- Provide PFRDA with tools to monitor and enforce these service levels.
- Motivate the SI to maintain service standards and address issues promptly.
- Establish a framework to impose compensation only when justified.

2. Escalation Mechanism

The SLA categorizes incidents by severity and outlines the escalation levels and responsible officers. Below is the escalation matrix:

| Escalation Level | Responsible Officer |
|------------------|--------------------------------------|
| Level 1 | SI's Service Desk Executive/ SPOC |
| Level 2 | SI's Project Manager |
| Level 3 | SI's Project Director |

3. Availability of IT System

1. **High Availability:** The expected availability of the IT system is 99.5% or higher, measured quarterly.
2. **Single Point of Contact:** SI should provide a single point of contact on a 24×7 basis.
3. **Planned Downtime:** This will not be classified as unavailability, but it should be limited to a maximum of 48 hours per quarter. Planned downtimes should preferably be scheduled on weekends or holidays after end of day (EoD). The duration of the maximum allowable planned downtime will be reviewed by PFRDA on a half-yearly or yearly basis.

4. Service Windows & Severity Levels

Service disruptions are categorized by severity and impact. Below is the severity matrix:

| Severity Level | Impact | Urgency | Actions |
|--------------------|---|-----------|---|
| Level 1 (Critical) | Severe disruption to core functionality | Immediate | Immediate resolution and continuous updates |
| Level 2 (High) | Significant disruption to critical processes | Urgent | Expedited resolution and regular updates |
| Level 3 (Medium) | Moderate disruption to non-critical processes | Normal | Resolution as part of regular operations |

5. Service Levels

5.1 Development Phase

| Service Category | Description | Service Level Agreement | Breach Threshold | Liquidated Damages |
|------------------------|---|-------------------------|---|---|
| Implementation/Go live | Activities include resource deployment, requirement gathering, system design, cloud infrastructure provisioning, security audit, environment setup, and UAT. Delay impacts scheduled Go-live. | T + 6 Months | Go-live not completed beyond 6 months and reasons not attributable to PFRDA | 0.15% of the TCO for each week of delay beyond the scheduled date of Go-live. SI must identify risks and inform PFRDA. If the over-run is not attributable to SI, PFRDA will consider not imposing the penalty. |

5.2 Warranty and Stabilization Phase

| Service Category | Description | Service Level Agreement | Breach Threshold | Liquidated Damages |
|--|---|--|--|---|
| Resolution turnaround time for Bugs/security fixes | Bug resolution turnaround time is calculated from when the Bug (including security incident) is reported to the Development team until resolution is provided. Dependence on other teams should be reported within 1 day. | Critical: ≤ 4 hours High: ≤ 2 days Medium: ≤ 5 days | Critical bug fixes (including security incident) >4 hours High bug fixes >2 days Medium bug fixes > 5 days | <ul style="list-style-type: none"> • Critical bug fixes (including security incident) > 4 hours: 0.5% per hour of Warranty & Stabilization invoice value of the billing period (Annexure VIII, Sl. No C, Total Cost for Warranty & Stabilization Phase) • High bug fixes > 2 days: 0.5% per day of Warranty & Stabilization invoice value of the billing period (Annexure VIII, Sl. No C, Total Cost for Warranty & Stabilization Phase) • Medium bug fixes > 5 days: 0.25% per day of Warranty & Stabilization invoice value of the billing period (Annexure VIII, Sl. No C, Total Cost for Warranty & Stabilization Phase) |
| Availability of Connect & services | Uptime = $1 - \frac{[(\text{Application downtime excluding planned downtime}) / (\text{Total Time in the billing period})]}{\text{Measured on}}$ | $>99.5\%$ | $<99.5\%$ | 1.0% of Warranty & Stabilization Invoice value of the billing period (Annexure VIII , Sl. No C, Total Cost for Warranty & Stabilization Phase) |

| Service Category | Description | Service Level Agreement | Breach Threshold | Liquidated Damages |
|------------------|---|-------------------------|------------------|--------------------|
| | 24x7 basis. Downtime due to non-SI components, or force majeure, is excluded. | | | |

5.3 Operations & Maintenance Phase (AMC)

| Service Category | Description | Service Level Agreement | Breach Threshold | Liquidated Damages |
|--|---|--|---|---|
| Resolution turnaround time for Bugs/Security fixes | Bug resolution turnaround time is calculated from when the Bug (including security incident) is reported to the Development team until resolution is provided. Dependence on other teams should be reported within 1 day. | <p>Critical: \leq 4 hours</p> <p>High: \leq 2 days</p> <p>Medium: \leq 5 days</p> | <p>Critical bug fixes (including security incident) $>$4 hours</p> <p>High bug fixes $>$2 days</p> <p>Medium bug fixes $>$ 5 days</p> | <ul style="list-style-type: none"> • Critical bug (including Security incident) fixes $>$ 4 hours: 0.5% per hour of AMC invoice value of the period for respective AMC billing quarter of each AMC year (i.e D for AMC year 1, E for AMC year 2, F for AMC year 3 and G for AMC year 4) • High bug fixes $>$ 2 days: 0.5% per day of AMC invoice value of the period for respective AMC billing quarter of each AMC year (i.e D for AMC year 1, E for AMC year 2, F for AMC year 3 and G for AMC year 4) • Medium bug fixes $>$ 5 days: 0.25% per day of AMC invoice value of the period for respective AMC billing quarter of each AMC year (i.e D for AMC year 1, E for AMC year 2, F for AMC year 3 and G for AMC year 4) |

| Service Category | Description | Service Level Agreement | Breach Threshold | Liquidated Damages |
|------------------------------------|---|-------------------------|------------------|---|
| | | | | for AMC year 3 and G for AMC year 4) |
| Availability of Connect & services | (Total time in the billing period -Unplanned downtime in the billing-period)/(Total time in the billing period) x 100 % | >99.5% | <99.5% | 1.0% of Invoice value of the period for respective AMC billing quarter of each AMC year (i.e D for AMC year 1, E for AMC year 2, F for AMC year 3 and G for AMC year 4) |

6. SLA Supervision during AMC

The SI is required to submit quarterly SLA performance reports by the 10th calendar day of the subsequent quarter. These reports will include details of all incidents, compliance with service levels, and any non-compliance issues. PFRDA reserves the right to audit these reports and may appoint a third-party auditor for validation.

7. SLA Change Control

Changes to the SLA can be requested by either party and must be negotiated in good faith. Any changes will be documented as an addendum to the SLA.

8. Issue Management Process

If issues arise that cannot be resolved quickly, they should be escalated through the management structure. If consensus is not reached, PFRDA will make the final decision.

9. Limitation of Liability

- 9.1 The total cumulative liability of SI shall not exceed the total amount paid/payable to the SI by PFRDA till date (excluding the taxes, reimbursements etc.). However, this limitation shall not apply to any liability for damages/compensation arising from breach of SI's obligations affecting the project adversely to the detriment of PFRDA (a) wilful default/deliberate inaction/fraud by SI or (b) indemnification claims by third party for infringement against PFRDA.
- 9.2 The SI will not be liable for delays caused by PFRDA or its contractors.

10. Compensation

- 10.1 In case of non-replacement of resource within two weeks after the release of existing resource, a compensation of Rs. 10,000/- per day will be payable till the new and suitable resource is provided.
- 10.2 The compensation for data breach and violation of confidentiality of information shall be payable at the rate of 10% of the annual payment for each instance of violation in case of any breach.

11. Other Conditions

Penalties will be deducted from the SI's bills. No payment will be released before the penalty is paid.

12. Exclusions

The SI will not be penalized for SLA breaches due to delays caused by PFRDA, force majeure events, or other issues beyond their control.

Appendix V: Draft Non-Disclosure and Confidentiality Agreement (Indicative)

(To be executed on a stamp paper)

This Reciprocal Non-Disclosure Agreement (the “Agreement”) is made and entered into on this ___ day of _____, 2024, between:

Pension Fund Regulatory and Development Authority (PFRDA), having its office at E-500, Tower E, 5th Floor, World Trade Centre, Nauroji Nagar, New Delhi-110 029 (hereinafter referred to as the “Authority,” which expression shall include its successors and assigns) of the **One Part**

And

A private/public limited company/LLP [strike off whichever is not applicable], incorporated under the provisions of the Companies Act, 1956/2013/Limited Liability Partnership Act 2008 [strike off whichever is not applicable], having its registered office at _____ (hereinafter referred to as the “System Integrator (SI)” which expression shall, unless repugnant to the subject or context thereof, mean and include its successors and permitted assigns) of the **Other Part**.

Whereas:

The SI is engaged in the business of providing _____, and has agreed to _____ for PFRDA and other related tasks.

Each of the parties mentioned above are collectively referred to as the “Parties” and individually as a “Party.”

To facilitate their business relationship, the Parties need to disclose certain valuable confidential information to each other (the Party receiving the information being referred to as the “Receiving Party” and the Party disclosing the information being referred to as the “Disclosing Party”). Therefore, in consideration of the mutual disclosure of confidential information and intending to be legally bound, the Parties agree to the terms and conditions set forth below.

Now, It Is Hereby Agreed by and Between the Parties as Follows:

1. Confidential Information and Confidential Materials

1.1. “Confidential Information” means non-public information that the Disclosing Party designates as confidential or which, under the circumstances of disclosure, should be treated as confidential. Confidential Information includes, but is not limited to, information relating to developed, installed, or purchased Disclosing Party software or services products, the general architecture of Disclosing Party’s network, data stored within the network or any other storage media, Disclosing Party’s business policies, practices, methodology, policy design, delivery, and

information received from third parties that the Disclosing Party is obligated to keep confidential. Confidential Information disclosed by any Disclosing Party subsidiary and/or agents is also covered by this Agreement.

1.2. Confidential Information shall not include information that:

- a) is or becomes publicly available without breach of any obligation owed to the Disclosing Party;
- b) was known to the Receiving Party prior to the Disclosing Party's disclosure, free from any confidentiality obligations;
- c) is received from a third party without breach of an obligation of confidentiality and without restrictions on use and disclosure; or
- d) is independently developed by the Receiving Party.

1.3. "Confidential Materials" refers to all tangible materials containing Confidential Information, including written or printed documents and computer disks or tapes, whether machine-readable or user readable.

2. Restrictions and Obligations

- 2.1 Each Party shall treat the Contract, and all information obtained from the other Party pursuant to the Contract as confidential and shall not disclose such information to any third party (except to its "Covered Persons," which includes employees, contingent workers, and professional advisers who need to know the information) without the other Party's written consent. This obligation does not extend to information that was rightfully in the possession of the Party prior to the commencement of negotiations, is already public knowledge, or becomes public through no fault of the Party.
- 2.2 The Receiving Party shall execute or have executed appropriate written agreements with Covered Persons to ensure compliance with this Agreement. Any breach of this Agreement by the Receiving Party's Covered Persons or subcontractors shall be deemed a breach by the Receiving Party.
- 2.3 The Receiving Party may disclose Confidential Information as required by judicial or governmental orders, provided that the Receiving Party gives reasonable notice to the Disclosing Party (unless restricted by applicable law) and complies with any applicable protective order. The intended recipients for this purpose include statutory auditors of either Party and government or regulatory authorities overseeing the Parties' affairs, including inspectors and supervisory bodies.
- 2.4 Confidential Information and Confidential Materials may be disclosed, reproduced, summarized, or distributed only in pursuit of the Receiving Party's business relationship with the Disclosing Party, and only as otherwise permitted herein. The Receiving Party agrees to segregate all Confidential Materials from those of others to prevent mixing.

3. Rights and Remedies

- 3.1 The Receiving Party shall promptly notify the Disclosing Party upon discovery of any unauthorized use or disclosure of Confidential Information or Confidential Materials, or any breach of this Agreement, and will cooperate with the Disclosing

- Party to regain possession of the Confidential Information and prevent further unauthorized use.
- 3.2 The Receiving Party shall return all originals, copies, reproductions, and summaries of Confidential Information or Confidential Materials upon request from the Disclosing Party or, at the Disclosing Party's option, certify their destruction.
- 3.3 The Receiving Party acknowledges that monetary compensation may not be a sufficient remedy for unauthorized disclosure of Confidential Information and that the Disclosing Party may seek injunctive or equitable relief, in addition to any other rights or remedies, as determined by a competent court. Remedies may include:
- a) Suspension of access privileges
 - b) Change of personnel assigned to the job
 - c) Termination of the contract
- 3.4 The Disclosing Party may visit the Receiving Party's premises, with reasonable prior notice and during normal business hours, to review compliance with this Agreement.
- 4. Miscellaneous**
- 4.1 All Confidential Information and Confidential Materials remain the sole property of the Disclosing Party. Disclosing information does not grant any express or implied rights to disclose under the Disclosing Party's patents, copyrights, trademarks, or trade secrets.
- 4.2 Confidential Information is provided "as is," and the Disclosing Party disclaims all representations and warranties, express or implied, including but not limited to accuracy, completeness, performance, and merchantability, except where fraud or willful default by the Disclosing Party is involved.
- 4.3 Neither Party grants the other any license, by implication or otherwise, to use Confidential Information other than for the purpose of evaluating or advancing the business relationship between the Parties, nor any rights in patents, copyrights, or other intellectual property.
- 4.4 The Confidentiality obligations under this Agreement do not limit either Party's right to independently develop or acquire products without using the other Party's Confidential Information. The Parties may use residuals resulting from access to or work with Confidential Information, provided they maintain confidentiality as required. "Residuals" include non-tangible information such as ideas, concepts, know-how, or techniques retained by individuals who had access to Confidential Information. Neither Party is obligated to limit or restrict the assignment of such individuals or to pay royalties for work resulting from residuals, but this does not grant a license under the other Party's copyrights or patents.
- 4.5 This Agreement constitutes the entire agreement regarding the subject matter and supersedes all prior agreements. It can only be modified by a written agreement signed by both Parties. No waiver of any provision will be considered a waiver of any other provision or occurrence of the same provision.
- 4.6 In case of any dispute, it shall be resolved in accordance with the arbitration clause in the master agreement.

- 4.7 This Agreement will benefit and bind the Parties, their successors, and assigns. It is subject to the terms of the RFP and the master service agreement, which shall prevail.
- 4.8 If any provision is deemed illegal, invalid, or unenforceable, the remaining provisions will remain in effect.
- 4.9 Amendments to this Agreement must be made in writing and executed by authorized officials of each Party, forming part of this Agreement.
- 4.10 The validity, interpretation, and legal relations of this Agreement shall be governed by the laws of India and shall be subject to the exclusive jurisdiction of the Courts in New Delhi.
- 4.11 This Agreement shall be effective from _____ ("Effective Date") and valid for 180 days from the contract completion date. Confidentiality obligations with respect to individually identifiable information, customer data, or software in human-readable form (e.g., source code) shall survive indefinitely.

5. Suggestions and Feedback

Either Party may provide suggestions, comments, or feedback regarding Confidential Information provided by the other Party ("Feedback"). All Feedback is voluntary and will not create confidentiality obligations unless agreed separately. The Receiving Party shall not disclose the source of Feedback without the provider's consent. Feedback shall be clearly designated, and each Party may use and disclose Feedback as it sees fit, without obligation to the other Party, without affecting Confidentiality obligations.

Dated this ___ day of _____, 2024, at _____

For and on behalf of

Pension Fund Regulatory and Development Authority (PFRDA)

Name: _____

Designation: _____

Place: _____

Signature: _____

For and on behalf of

[Name of the Company/LLP/Firm]

Name: _____

Designation: _____

Place: _____

Signature: _____

Appendix VI: Draft Master Service Agreement (Indicative)

This Master Service Agreement (“Agreement”) is made on this the <<Date>> day of <<Month>> <<Year>> at <<Place>>, India.

BETWEEN

Pension Fund Regulatory and Development Authority through <<Name of the Officer>> <<Designation>>, PFRDA having its office at E-500, Tower E, 5th Floor, World Trade Centre, Nauroji Nagar, New Delhi-110 029 hereinafter referred to as ‘**PFRDA**’ or ‘**Authority**’, which expression shall, unless the context otherwise requires, include its permitted successors, and assigns).

AND

<<Company Name>>, company registered under the provisions of the Indian Companies Act, 1956/2013 or a firm registered under the Limited Liability Partnerships Act, 2008, having its registered office at <<Company Address>> (hereinafter referred to as ‘**System Integrator/SI**’ which expression shall, unless the context otherwise requires, include its permitted successors and assigns).

Each of the parties mentioned above are collectively referred to as

the ‘**Parties**’ and individually as a ‘**Party**’.

WHEREAS:

PFRDA is desirous to implement the project for “Selection of System Integrator(SI) for Design, Development, Implementation and Maintenance of PFRDA Website (hereafter referred to as PFRDA-Connect) which is a very significant project through which PFRDA seeks to improve its role as a regulator by overhauling its official website, leading to improve user experience throughout the entire user journey. This enhancement will specifically target the needs of the diverse user base through the deployment of an easy-to-use, modular, and interactive solution based on the latest technological advancements. The solution will include a comprehensive future development roadmap and will be hosted on a MEITY-empanelled CSP’s Virtual Private Cloud (VPC).

In furtherance of the same, PFRDA undertook the selection of a suitable System Integrator through an open competitive Bidding process for implementing the Project and in this behalf issued Request for Proposal (RFP) Ref No: PFRDA/2024/TARCH/PFRDA-Connect/01, dated 6th November 2024 on PFRDA website www.pfrda.org.in under Tenders Section and <https://eprocure.gov.in/epublish/app> on 6th November 2024 with the last date of submission was _____ and Addendum/Corrigendum to the Request for Proposal.

The successful bidder has been selected as the System Integrator on the basis of the bid response as part of this of this Agreement, to undertake the Project, its roll out and sustained operations.

NOW THEREFORE, in consideration of the mutual covenants, promises, assurances, representations and provisions set forth herein, the Parties hereto agree as follows:

1. Definitions & Interpretations

1.1 For the purpose of this agreement:

- (i) **Adverse Effect:** means material adverse effect on the ability of the System Integrator to exercise any of its rights or perform/discharge any of its duties/obligations under and in accordance with the provisions of this Agreement and/or the legal validity, binding nature, or enforceability of this Agreement.
- (ii) **Agreement:** means this Agreement/contract together with all Articles, Annexures, Schedules and the contents and specifications of the RFP.
- (iii) **Applicable Law(s):** means any statute, law, ordinance, notification, rule, regulation, judgment, order, decree, byelaw, approval, directive, guideline, policy, requirement or other governmental restriction or any similar form of decision applicable to the relevant party and as may be in effect on the date of the execution of this Agreement and during the subsistence thereof, applicable to the Project.
- (iv) **Application:** means the project or software application developed as a part of scope of work set out in this agreement.
- (v) **Application Downtime:** means the time for which user/s is not able to access the application. However, in calculating downtime, scheduled downtime (for example, backup time, batch processing time, routine maintenance time) would not be considered.
- (vi) **Assets:** means entire services and software, network or any other information technology infrastructure components used for the Project and other facilities leased/owned/operated by the System Integrator exclusively in terms of ensuring their usability for the delivery of the Services as per this Agreement.
- (vii) **Contract:** means same as “Agreement” as defined in 1.1.(ii) above.
- (viii) **Software:** means the application software/product/customization components designed, developed, tested, and deployed by SI for the purposes of rendering the services and includes the source code along with associated documentation, which is the work product of the development efforts involved in the Project and the improvements effected to such software during the tenure of appointment, on such products, proprietary software components and tools deployed by SI.
- (ix) **Business Hours:** means the working time for PFRDA users which at present is 9:30 AM to 6:00 PM but shall be subject to extension depending upon the work. Cloud or Server and other components which enable successful usage of the software application of PFRDA, the working time should be considered as 24 hours for all the days of the week. It is desired that IT maintenance, other batch

processes (like backup) etc. should be planned so that such backend activities have minimum effect on the performance.

- (x) **Confidential Information:** means all information including PFRDA Data (whether in written, oral, electronic or other format) which relates to the technical, financial and business affairs, dealers, suppliers, products, developments, operations, processes, data, trade secrets, design rights, know-how, plans, budgets and personnel of each Party and its affiliates which is disclosed to or otherwise learned by the other Party in the course of or in Connection with this Agreement (including without limitation such information received during negotiations, location visits and meetings in Connection with this Agreement);
- (xi) **Deliverables:** means the products, infrastructure and services agreed to be delivered by the System Integrator in pursuance of the agreement as defined more elaborately in the RFP, Implementation and the Maintenance phases and includes all documents related to the user manual, technical manual, design, process and operating manuals, service mechanisms, policies and guidelines (such as security related, data migration related), inter alia payment and/or process related etc., source code and all its modifications;
- (xii) **PFRDA Data:** means all proprietary data of the departments within PFRDA, or its nominated agencies generated out of operations and transactions, and related information including but not restricted to user data which the System Integrator obtains, possesses, or processes in the context of providing the Services to the users pursuant to this Agreement.
- (xiii) **Effective Date:** means the date when this contract starts.
- (xiv) **Force Majeure:** means any event which is unforeseeable, beyond the control of the affected party and materially affects its capacity to perform this Agreement. Such events may include war, civil war, insurrection, riots, revolutions, fire, floods, epidemics, strikes and earthquakes.
- (xv) **GoI:** means the Government of India.
- (xvi) **Intellectual Property Rights (IPR) Clause**
 - a) All licenses, software, applications, processes, technologies developed by the SI for the purpose of the project, shall be the exclusive property of PFRDA, on which PFRDA shall have sole ownership and all attendant rights emanating therefrom, including rights of Intellectual Property. The exclusive rights of PFRDA shall also extend to the use and ownership of such other licenses, software, applications, processes, technology which belong to SI or sourced by it from a third party, for the exclusive purpose of the project, other than that is specifically excluded by a mutual understanding between the parties. These rights shall be available beyond the original term of the project and SI shall allow the use of the same without any limitations or restrictions.
 - b) **Ownership of Existing Intellectual Property:**
PFRDA acknowledges that the SI may have existing intellectual property rights ("Existing IPR") that are relevant to the project. The SI may retain ownership of

all Existing IPR, subject to mutual understanding of the parties, such that right to use by PFRDA shall not be restricted or limited in any manner for the implementation of the project, at all times.

- c) **New Intellectual Property:**
 SI may if required, develop new intellectual property rights ("New IPR") as part of the PFRDA-Connect. All New IPR, including but not limited to software code, algorithms, documentation, designs, and any other materials developed specifically for the project, shall be the exclusive property of PFRDA.
- d) PFRDA shall have the sole and exclusive right to use, modify, reproduce, distribute, and otherwise exploit the New IPR without any further rights to the SI, except as explicitly agreed upon in this contract.
- (xvii) **License for Pre-existing Third-Party Components:** If the SI uses third-party components or software in the entire project tenure, the SI shall ensure that it or PFRDA obtains any necessary licenses or rights to use such components at no additional cost other than the quoted price in financial bid. Such licenses & any related expenses are to be borne by SI during the entire contract period. PFRDA shall not be responsible for any fees associated with obtaining such licenses during the entire contractual period. SI shall not restrain or withhold itself from procuring and processing such licenses, which shall be detrimental to the smooth implementation of the project.
- (xviii) **License for Pre-existing Third-Party Components:** If the SI uses third-party components or software in the entire project tenure, the SI shall ensure that PFRDA obtains any necessary licenses or rights to use such components at no additional cost other than the quoted price in financial bid. Such licenses & any related expenses are to be borne by SI during the entire contract period. PFRDA shall not be responsible for any fees associated with obtaining such licenses during the entire contractual period. SI shall not restrain from processing such licenses, which shall be detrimental to the smooth implementation of the project.
- (xix) **License for Vendor's Tools and Frameworks:** The SI may use its own proprietary tools, frameworks, or methodologies ("SI Tools") in the execution of the project. The SI shall grant PFRDA a non-exclusive, royalty-free, worldwide license to use such Tools solely for the purpose of the project.
- (xx) **Material Breach:** means a breach by either Party (PFRDA or System Integrator) of any of its obligations under this Agreement which has or is likely to have an Adverse Effect on the Project which such Party shall have failed to cure.
- (xxi) **Parties:** means PFRDA and System Integrator for the purposes of this Agreement and "Party" shall be interpreted accordingly.
- (xxii) **Performance Security:** mean the guarantee provided by SI from a scheduled bank in favour of PFRDA for the performance of its obligations under this Agreement.
- (xxiii) **Planned Application Downtime:** means the unavailability of the application services due to maintenance activities such as configuration changes, up

- gradation, or changes to any supporting infrastructure wherein prior intimation (at least two working days in advance) of such planned outage shall be given and approval sought from PFRDA as applicable.
- (xxiv) **Project:** means the software system as per the Scope of work in RFP or such other modifications to the scope of work and includes the scope outlined in this agreement.
- (xxv) **Project Implementation:** means Project Implementation as per the testing standards and acceptance criteria stated in RFP document.
- (xxvi) **Replacement System Integrator:** means any third party that PFRDA appoint to replace System Integrator upon expiry of the Term or in the event of termination of this Agreement to undertake the provision of Services, as defined hereunder, or part thereof.
- (xxvii) **Required Consents:** "Required Consents" refer to the consents, waivers, clearances, licenses, and any other authorizations necessary to facilitate the use of PFRDA's Intellectual Property Rights, as defined in Clause XVI, and other permissions that are required by PFRDA or their designated agencies to furnish to the System Integrator in accordance with the terms of this Agreement.
- (xxviii) **Services:** means the services delivered to the Stakeholders of PFRDA, employees of PFRDA, created, procured, installed, managed, and operated by the System Integrator.
- (xxix) **SLA:** means the Performance and Maintenance Service Level Agreement executed by and between PFRDA & SI.

- (xxx) **System:** means the System designed, developed/customized, tested and deployed by the System Integrator for the purposes of the Project and includes the source code along with associated documentation, which is the work product of the development efforts involved in the Project and the improvements and enhancements effected during the term of the Project.
- (xxxii) **Incorporation of Request for Proposal (RFP) into the Master Services Agreement (MSA):** The parties hereby acknowledge and agree that the Request for Proposal (RFP), identified as “REQUEST FOR PROPOSAL FOR SELECTION OF SYSTEM INTEGRATOR (SI) FOR DESIGN, DEVELOPMENT, IMPLEMENTATION AND MAINTENANCE OF PFRDA WEBSITE (PFRDA-Connect)”, RFP No. PFRDA/2024/TARCH/PFRDA-Connect/01, Dated 6th November 2024, and all its terms, conditions, specifications, and responses thereto, shall be deemed to be an integral part of this Master Services Agreement (MSA). Any inconsistencies or ambiguities arising between the RFP and the MSA shall be resolved harmoniously. Both parties shall be bound by the obligations and representations set forth in the RFP, as though they were set forth verbatim in this MSA. The decision of PFRDA shall be final on any interpretation, if required, or on the existence or not of any inconsistency as may be brought by SI, if at all.
- (xxxiii) **Unplanned Application Downtime:** means the total time for all the instances where the application is not available except planned downtime as defined in 1.1. (xxii).
- (xxxiiii) **RFP:** means Request for Proposal for “SELECTION OF SYSTEM INTEGRATOR (SI) FOR DESIGN, DEVELOPMENT, IMPLEMENTATION AND MAINTENANCE OF PFRDA WEBSITE (PFRDA-Connect)”, RFP No. PFRDA/2024/TARCH/PFRDA-Connect/01, Dated 6th November 2024, and Addendum/Corrigendum to the Request for Proposal, Ref no: PFRDA/2024/TARCH/PFRDA-Connect/01, dated 6th November 2024.

1.2 Interpretation

In this Agreement, unless otherwise specified:

- (i) references to a ‘**company**’ shall be construed so as to include any company, corporation, or other body corporate, wherever and however incorporated or established.
- (ii) references to a ‘**business day**’ shall be construed as a reference to a day (other than a Saturday or Sunday or a public holiday as notified by PFRDA) on which the offices of PFRDA are generally open for business.
- (iii) The terms “System Integrator” (SI) and “Implementing Agency (IA)” have been used for the same entity i.e., successful bidder selected for the project.

2. Measurements and Arithmetic Conventions

All measurements and calculations shall be in the metric system and calculations done to 2 (two) decimal places, with the third digit of 5 (five) or above being rounded up and below 5 (five) being rounded down except in money calculations where such amounts shall be rounded off to the nearest INR.

3. Priority of Documents

4.1 This Agreement, including its Schedules and Annexures, represents the entire agreement between the Parties as noted in this Clause. If in the event of a dispute as to the interpretation or meaning of this Agreement it should be necessary for the Parties to refer to documents forming part of the bidding process leading to this Agreement, then such documents shall be relied upon and interpreted in the following descending order of priority:

- a) This Agreement
- b) The SLA
- c) Schedules and Annexures to this agreement.
- d) The RFP along with subsequently issued Corrigendum/Addendum
- e) Technical and financial proposal submitted by the successful bidder, in response to the RFP, to the extent they are consistent with any terms of the RFP.
- f) NDA
- g) Integrity Pact
- h)

4.2 For the avoidance of doubt, it is expressly clarified that any inconsistencies or ambiguities arising between the RFP and the MSA shall be resolved harmoniously in the event of a conflict between this Agreement, Annexures/Schedules or the contents of the RFP, the terms of this Agreement shall prevail over the Annexures/Schedules and Annexures/Schedules shall prevail over the contents and specifications of the RFP.

4. Basic understanding

SI hereby confirms that:

- a) It has fully understood the functions which it has to perform and the obligations it has to discharge as SI as detailed in this Agreement and it acknowledges that this project is very significant to PFRDA in discharge of its powers and functions under the PFRDA Act, 2013.
- b) It has the required skills, technical knowledge, qualified personnel, and expertise to carry out its functions and obligations and to provide the services under this Agreement and will build the necessary infrastructure for the purpose.

- c) It possesses the consents of appropriate authorities, licenses, permits and approvals as are necessary for carrying out its functions and obligations under this Agreement.
- d) The parties hereby agree that the above is the basic understanding and based on which PFRDA has entered into this Agreement.

5. Scope of the Project

5.1 The project comprises of re-designing and development of complete User Experience of PFRDA Website, Microsites and further leverage it by using an enterprise grade Content Management System – CMS. This will include migration of data & content from the existing website to the new website. Bidders must ensure that entire end-to-end solution must be on-cloud (VPC) and none of the integrated solution nor modules to have dependency on any public or external cloud.

5.2 The SI shall be responsible for performing the following task:

1. Design and develop of the website as per the latest GIGW guidelines, in discussion with PFRDA, leading to the overall improvement of the user interface and user experience.
2. Supporting bilingual (Hindi & English) website contents and maintaining the same as required by PFRDA. PFRDA may in certain cases provide content already translated from English to Hindi. However, the website must have capability to translate English contents into Hindi automatically.
3. Ensure that website is WCAG Level 2.2 compliant
4. Overall branding, UI elements and theme should be consistent across all platforms
5. AMC services for 4 years after completion of warranty & stabilization.

5.3 Detailed scope of work for the SYSTEM INTEGRATOR is outlined in the RFP, RFP Reference No: PFRDA/2024/TARCH/PFRDA-Connect/01, dated 6th November 2024.

6. Term and Duration of the Agreement

This Agreement shall come into effect on <<dd/mm/yyyy>> (hereinafter the ‘Effective Date’) and unless terminated earlier, this agreement shall be in force and effect for a period as defined in RFP. After the end of the contract period, PFRDA reserves the right to either continue with the existing SI with either same or revised terms and conditions as mutually agreed by both parties or assign the work to another SI as it may deem necessary.

7. Conditions Precedent and Effective Date

7.1 Provisions to take effect upon fulfilment of Conditions Precedent

Subject to express terms to the contrary, the rights and obligations under this Agreement shall take effect only upon fulfilment of all the Conditions Precedent set out below. However, PFRDA may at any time at its sole discretion waive fully or partially any of the conditions precedent for the System Integrator, without there being any obligations to do so.

7.2 Conditions Precedent

The System Integrator shall be required to fulfil the Conditions Precedent which is to comply with all the conditions stated in RFP, as per the timelines defined in it to provide a Performance Security/Guarantee as stated in to provide PFRDA certified true copies of its constitutional documents and board resolutions authorizing the execution, delivery, and performance of this Agreement by the System Integrator

7.3 Extension of time for fulfilment of Conditions

The Parties may, by mutual agreement extend the time for fulfilling the Conditions Precedent and the Terms of this Agreement.

8. Non-fulfilment of the System Integrator's Conditions Precedent

8.1 In the event that any of the Conditions Precedent of the System Integrator have not been fulfilled within 30 days of signing of this Agreement and the same have not been waived fully or partially by PFRDA, this Agreement shall cease to exist.

8.2 In the event that the Agreement fails to come into effect on account of non- fulfilment of the System Integrator's Conditions Precedent, PFRDA shall not be liable in any manner whatsoever to the System Integrator or any third party and PFRDA shall forthwith forfeit the EMD/Performance Security.

8.3 In the event that possession of any of PFRDA facilities have been delivered to the System Integrator prior to the fulfilment of the Conditions Precedent, upon the termination of this Agreement such shall immediately be reverted to PFRDA, free and clear from any encumbrances or claims.

9. Representations and Warranties

9.1 Representations and warranties of the System Integrator

The System Integrator represents and warrants to PFRDA that:

- (i) it is duly organized and validly existing under the laws of India and has full power and authority to execute and perform its obligations under this Agreement.
- (ii) it has taken all necessary corporate and other actions under laws applicable to its business to authorize the execution and delivery of this Agreement and to validly exercise its rights and perform its obligations under this Agreement.

- (iii) from the Effective Date, it will have the financial standing and capacity to undertake the Project in accordance with the terms of this Agreement.
- (iv) this Agreement has been duly executed by it and constitutes a legal, valid, and binding obligation, enforceable against it in accordance with the terms hereof, and its obligations under this Agreement shall be legally valid, binding, and enforceable against it in accordance with the terms hereof.
- (v) the information furnished in the bid response and as updated on or before the date of this Agreement is to the best of its knowledge and belief, true and accurate in all material respects as at the date of this Agreement.
- (vi) the execution, delivery and performance of this Agreement is not in conflict with, or result in the breach of, or constitute a default by any of the terms of its Memorandum and Articles of Association or any Applicable Laws or any covenant, contract, agreement, arrangement, understanding, decree, or order to which it is a party.
- (vii) it has complied with Applicable Laws in all material respects and has not been subject to any fines, penalties, injunctive relief or any other civil or criminal liabilities which in the aggregate have or may have an Adverse Effect on its ability to perform its obligations under this Agreement; and
- (viii) no sums, in cash or kind, have been paid or shall be paid, by it or on its behalf, to any person by way of fees, commission or otherwise for entering into this Agreement or for influencing or attempting to influence any officer or employee of PFRDA in Connection therewith.

9.2 Representations and warranties of PFRDA

PFRDA represent and warrant to the System Integrator that:

- (i) It has taken all necessary actions under Applicable Laws to authorize the execution, delivery, and performance of this Agreement and to validly exercise its rights and perform its obligations under this Agreement.
- (ii) This Agreement has been duly executed by it and constitutes a legal, valid, and binding obligation enforceable against it in accordance with the terms hereof and its obligations under this Agreement shall be legally valid, binding, and enforceable against it in accordance with the terms thereof; and
- (iii) All information provided by it in the RFP in Connection with the Project is, to the best of its knowledge and belief, true and accurate in all material respects.

10. Obligations of PFRDA

Without prejudice to any other undertakings or obligations of PFRDA under this Agreement, PFRDA shall perform the following:

- (i) To authorize the System Integrator to interact for implementation of the Project with external entities such as the MEITY empanelled VPC provider, other System Integrators, SMS/Email Gateway System Integrators etc.

- (ii) To provide seating space for the onsite SI team in PFRDA premise along with basic amenities like table, chair, desk etc.
- (iii) Review and provide timely approval to deliverables submitted by the SI.
- (iv) Facilitate to create congenial conditions for the success of the project.

11. Obligations of the System Integrator

The following forms illustrative obligations of System Integrator:

- (i) All data, information, output generated from using the system provided by SI under this project shall be the exclusive property of PFRDA on which it alone shall have ownership and will not be used by SI or any of its employees, affiliates or third parties in any manner without the prior permission of PFRDA, either for any commercial or non-commercial purposes.
- (ii) System Integrator shall be solely responsible for the performance and completion of all its obligations.
- (iii) It shall provide to PFRDA, the deliverables as set out in RFP document or as modified within the specified timelines. Both the timelines and quality delivery, in a cost-effective manner, shall be an essence of this project and this contract .
- (iv) It shall perform the Services as set out in RFP so as to comply with the applicable Service Levels set out with this Agreement.
- (v) It shall ensure that the Services are being provided as per the Project Timelines set out in RFP.
- (vi) System Integrator will abide by the job safety measures prevalent in India and will free PFRDA from all demands or responsibilities arising from accidents or loss of life, the cause of which is System Integrator's negligence. System Integrator will pay all indemnities arising from such incidents and will not hold PFRDA responsible or obligated.
- (vii) System Integrator shall be obliged to give timely and sufficient support to PFRDA's staff, work closely with PFRDA's staff, act, and abide by directives issued by PFRDA that are consistent with the terms of the Agreement and the RFP. System Integrator shall be responsible for managing the activities of its personnel and will hold itself responsible for any misdemeanours.
- (viii) System Integrator shall be responsible for and obligated to conduct all contracted activities with due care and diligence, in accordance with this Agreement and using state-of-the-art methods and exercising all reasonable means to achieve the performance specified in this Agreement.
- (ix) Whenever any designated personnel of System Integrator are leaving his job, System Integrator shall immediately inform the same on receipt and give prior information about this to PFRDA and provide suitable alternative personnel to the satisfaction of PFRDA

- (x) System Integrator's engineer(s) shall not change the password of network, security devices/applications software/tools without the knowledge of PFRDA's Team. In case they are aware about any password(s), they shall not share it with anyone other than PFRDA's team without prior written approval from PFRDA's Team.
- (xi) If necessary, PFRDA may escalate the call to higher authorities of System Integrator. In that case, System Integrator shall put their maximum efforts and deploy their best resources to resolve the calls at the earliest possible time frame at all locations and ensure appropriate uptime.
- (xii) System Integrator shall be responsible for any or all act of its employees that may result in security breach of confidentiality or any other breach under this agreement or in terms of this RFP.
- (xiii) System Integrator shall assign personnel of appropriate qualifications and experience to perform the services in order to fulfil its obligations.
- (xiv) System Integrator shall exercise requisite control and supervision over its personnel in the course of rendering the services and make best efforts to ensure that the services are rendered in a continuous and uninterrupted manner.
- (xv) System Integrator shall always respect the confidentiality of all information given to it by PFRDA and shall not divulge such information to any third party or other units without the prior written consent of PFRDA.
- (xvi) System Integrator shall promptly install/implement the corrected licensed software and/or maintenance releases/updates at no additional cost or fees or expenses.
- (xvii) System Integrator shall undertake regular preventive maintenance of the licensed software.
- (xviii) All bug fixations/modifications/enhancements relating to the licensed software shall be done by System Integrator in a time bound manner as per the SLA. The System Integrator shall adopt a common, smooth, timely, effective and satisfactory bug/enhancement handling mechanism.
- (xix) System Integrator is obliged to work closely with PFRDA's staff, act within its own authority and abide by directives/instructions issued by PFRDA from time to time.
- (xx) System Integrator shall be required to develop, maintain, and manage the proposed services to enable PFRDA to meet its requirements. It shall be System Integrator's responsibility to ensure compliance to the requirements of the continued operation of the intended services in accordance with and in strict adherence to the terms of its Bid, the RFP, and this Agreement.
- (xxi) In addition to the aforementioned, System Integrator shall ensure that System Integrator's Team is competent, professional and possesses the requisite qualifications and experience appropriate to the task they are required to perform under this Agreement. System Integrator shall ensure that the Services are performed through the best efforts of System Integrator's Team, in accordance with the terms hereof and as per Acceptance Criteria as stated in

the RFP. Nothing in this Agreement shall be considered to relieve System Integrator from its liabilities or obligations under this Agreement to provide the Services in accordance with PFRDA's directions and requirements and as stated in this Agreement and the Bid to the extent accepted by PFRDA and System Integrator shall be liable for any non-performance, non-compliance, breach or other loss and damage resulting either directly or indirectly by or on account of its Team.

- (xxii) All personnel so employed/engaged by System Integrator shall at all times be the employees of System Integrator under all statutes and in case any dispute arises between such personnel and System Integrator, it shall be resolved and settled between them. System Integrator agrees and undertakes that in no way System Integrator shall involve PFRDA in any of their grievances and/or disputes. System Integrator undertakes to indemnify PFRDA against any and all claims, proceedings, actions, damages, losses, costs, and expenses arising out of a) such grievances or disputes b) noncompliance of applicable law. c) non- payment/delays in payment of dues of its employees d) settlement/payments of any claim or compensation or dues pertaining to employees of System Integrator d) cost of litigation, proceeding including fees of legal professionals engaged by PFRDA for defending or responding or pursuing such litigation/proceedings. System Integrator shall maintain all books and records as are required to be maintained under the applicable rules, regulations and laws including muster roll, wage register, leave register etc. and System Integrator shall be solely and personally responsible and liable for the breach of any or all of the statutory obligations in respect of all its employees etc. engaged under this Agreement and PFRDA shall in no way be held responsible for any breach committed by System Integrator in this regard.
- (xxiii) PFRDA shall not be held liable or responsible for any claim (monetary or otherwise), damage (of any kind) or liability suffered by System Integrator and/or its employees/contractors, employed/engaged for providing services under this Agreement. System Integrator undertakes that no claim/dispute shall be raised against PFRDA by contractors or employees engaged by the System Integrator.
- (xxiv) System Integrator shall supply to PFRDA, prior to the effective date of commencement of works/services or kick-off meeting whichever is earlier, an organization chart showing the proposed organization/manpower to be established by System Integrator for execution of the work/facilities/services including the identities and Curriculum-Vitae of the key personnel to be deployed. System Integrator shall inform PFRDA in writing in advance, of any revision or alteration of such organization charts.
- (xxv) System Integrator shall be responsible for the deployment, transportation, accommodation, and other requirements of all its employees required for the execution of the work and for all costs/charges in Connection thereof or incidental thereto.

- (xxvi) System Integrator shall provide and deploy, onsite for carrying out the work, only those manpower resources who are skilled and experienced in their respective trades and who are competent to execute or manage/supervise the work in a proper and timely manner.
- (xxvii) PFRDA may at any time object to and require the System Integrator to remove forthwith from on-site a supervisor or any other authorized representative or employee of the System Integrator or any person(s) deployed by System Integrator, if, in the opinion of PFRDA the person in question has misconducted himself. System Integrator shall forthwith remove and shall not again deploy the person in question at the work site without the prior written consent of PFRDA's Representative.
- (xxviii) PFRDA may at any time direct System Integrator to remove from the work/Site System Integrator's supervisor or any other authorized representative including any employee of System Integrator, or any person(s) deployed by System Integrator for professional incompetence or negligence or for being deployed for work for which he is not suited. System Integrator shall take necessary steps to remove that person from deployment on the work, which System Integrator shall then forthwith do and shall not again deploy any person so objected to on the work or on the sort of work in question (as the case may be) without the written consent of PFRDA.
- (xxix) System Integrator shall maintain backup personnel and shall promptly provide replacement of every person removed, pursuant to this section, with an equally competent substitute from the pool of backup personnel.
- (xxx) In case of change in its team composition owing to attrition, System Integrator shall ensure seamless activities to ensure proper knowledge transfer and handover/takeover of documents and other relevant materials between the outgoing and the new member without adversely affecting the execution of the project. The exiting team member should be replaced with an equally competent substitute from the pool of backup personnel. System Integrator shall ensure that the project or services should not be adversely affected due to any change in team deployed/engaged to provide Services under this Agreement.
- (xxxi) System Integrator shall comply with the provision of all laws including Information Technology Act (as amended), labour laws, rules, regulations, and notifications issued there under from time to time. System Integrator shall comply with all norms relating to data protection including the Digital Personal Data Protection Act, 2023 or any law or rules or regulations that may be in force during the term of this Agreement. All safety and labour laws enforced by statutory agencies and by PFRDA shall be applicable in the performance of this Agreement and System Integrator shall abide by these laws.
- (xxxii) System Integrator shall promptly but not later than two days, report to PFRDA any evidence, which may indicate or is likely to lead to an abnormal or dangerous situation and shall take all necessary emergency control steps to avoid such abnormal situations.

- (xxxiii) System Integrator shall also adhere to all security requirement/regulations of PFRDA during the execution of the work.
- (xxxiv) System Integrator and its employees shall always adhere to internal security and safety policies of PFRDA.
- (xxxv) System Integrator shall put all efforts to ensure that no Computer Virus, Spyware, ransomware is introduced onto PFRDA's or any user's computer equipment or systems by any act, omission or negligence of System Integrator or its employees. The User shall mean any entity using services, software, systems etc. provided by PFRDA or licensed to PFRDA.
- (xxxvi) All other obligations of the SI not specifically mentioned under this agreement, shall be exactly as per the other terms and conditions of this RFP (to be fulfilled by the successful bidder), which shall be treated an integral part of this agreement.

12. Approvals and Required Consents

PFRDA shall use reasonable endeavours to assist System Integrator to obtain the Required Consents. In the event that any Required Consent is not obtained, the System Integrator and PFRDA will co-operate with each other in achieving a reasonable alternative arrangement as soon as reasonably practicable for PFRDA to continue to process its work with as minimal interruption to its business operations as is commercially reasonable until such Required Consent is obtained, provided that the System Integrator shall not be relieved of its obligations to provide the Services and to achieve the Service Levels until the Required Consents are obtained, such that execution of the project is neither delayed nor adversely affected in any other manner.

13. Financial Matters

13.1 Terms of Payment and Service Credits and Debits

- (i) In consideration of the Services and subject to the provisions of this Agreement and of the SLA, PFRDA shall pay the System Integrator for the Services rendered successfully and to the satisfaction of PFRDA in pursuance of this agreement, in accordance with the Payment Milestones set out in this Agreement.
- (ii) All payments shall be made to the System Integrator subject to the application of liquidated damages/ compensation and/or SLA as per Terms and Conditions defined in the RFP.

13.2 Invoicing and Settlement

Subject to the specific terms of the SLA, the System Integrator shall submit its invoices in accordance with the following principles:

- (i) PFRDA shall be invoiced by the System Integrator for the Services. Generally, and unless otherwise agreed in writing between the Parties or expressly set out in the SLA, the System Integrator shall raise an invoice; and
- (ii) Payment shall be made within 30 working days of the receipt of invoice along with supporting documents by PFRDA subject to deductions, where applicable on account of default.
- (iii) PFRDA shall be entitled to delay or withhold payment of any invoice or part of it delivered by the System Integrator which is in dispute. Endeavour shall be made by PFRDA to settle all bills and make payment within the time period. The disputed/withheld amount shall be settled post resolution of the dispute. Further, the System Integrator will not claim any interest on the arrear/payment due but not paid by PFRDA. Any exercise by PFRDA under this Clause shall not entitle the System Integrator to delay or withhold provision of the Services.

13.3 Performance Security

- (i) The Performance Security is required to protect the interest of PFRDA against delay in supply/installation and/or the risk of non- performance by the SI and to secure successful implementation of the project, or performance of the material or services sold, or seek required damages/compensation for any breaches stipulated, which may warrant invoking of Performance Security.
- (ii) Performance Security shall be 10% of the Total Contract value. Performance Security may be submitted for the amount with validity period as specified in the RFP strictly as per the format at [Appendix- II](#). The Performance security has to be issued by a Scheduled Commercial Bank and needs to be submitted within the specified time of receipt of formal communication from PFRDA about SI's Bid finally selected. The Performance Security may need to be extended accordingly depending on the extension of the Contract period. Performance security should be valid up to 180 days from the date of completion of the contract.

14. Termination of the contract

14.1 This contract may be terminated by PFRDA at any time upon the happening of any of the following events and shall be without prejudice to any other action on the part of PFRDA:

- (i) If the SI is in breach of any of the terms and conditions of this contract being a breach which in opinion of PFRDA is reasonably capable of remedy and where PFRDA serves notice on the SI specifying the breach and the SI fails to satisfactorily remedy such breach within 30 days after the service of such notice. Notwithstanding the said clause, PFRDA in the event of happening of any of violations/breaches according to it, may terminate the contract by giving a prior notice of 90 days in which case it shall not be necessary to give any opportunity to the SI to remedy the breach.
- (ii) If the SI shall be in material breach of any of the terms and conditions of this contract (including the basis on which SI was selected) being a breach which

- in opinion of PFRDA is not reasonably capable of remedy, by giving 90 days' notice.
- (iii) If by reason of any order/policy of a government or other authority the continued operation and performance of this contract and all its provisions in a material respect is prevented, discontinued, or is delayed for any unspecified and indeterminate period or is rendered impossible on account of any other reason.
 - (iv) If the SI is not able to perform its duties and obligations, consistently, despite specific opportunities granted to it such that in the opinion of PFRDA, the SI is not capable of performing the contract effectively.
 - (v) If the SI becomes insolvent or goes into either voluntary or compulsory liquidation or closure (except amalgamation or reconstruction provided that the emergent company affirms its adherence to the terms and conditions of the Agreement), or a Receiver or Manager is appointed in respect of the whole or part of SI or enter into any arrangement with its creditors either by composition or otherwise.
 - (vi) If in the opinion of PFRDA, the SI has been found to be indulging in corrupt practices or has obtained the award of the contract based on submission of false or incorrect information and documents or has been blacklisted by any government authority on the above grounds.
- 14.2 Besides the above, PFRDA reserves the right to terminate the agreement with the SI by giving the SI a notice of 90 days (with or without assigning any reason) if PFRDA decides that the services of the SI will no longer be required or PFRDA decides not to go ahead with the project, at all or in any other modified form. In such a case, PFRDA shall only be liable to pay for the services rendered (delivered) upto the effective date of termination.
- 14.3 SI shall be entitled to terminate the contract, where PFRDA delays in making payments (which is not in dispute) beyond a period of 180 days, from which it becomes due for payment.
- 14.4 Notwithstanding any period specified under this clause, the SI shall be required and liable to perform its obligations as per exit management plan and the contract shall be deemed to be in force only for such limited purpose to implement the exit management plan.
- 14.5 If the Contract is terminated, SI shall handover all documents/executable/Authority's data or any other relevant information to PFRDA in timely manner and in proper format as per scope of this contract/RFP and shall also support the orderly and seamless transition to another party/SI chosen by PFRDA or to PFRDA.
- 14.6 PFRDA's right to terminate the agreement/contract will be in addition to the right of seeking compensation and/or liquidated damages and other actions as may be deemed appropriate, besides PFRDA shall have the right to forfeit the Performance security in the event of breach or shortcomings on the part of SI or any loss caused to PFRDA, due to acts of omission or commission on the part of SI, without there being any requirement to prove the exact amount of loss. PFRDA shall also have the right to

call upon SI to extend the performance security by such time period as may be required to protect its rights or to secure the obligations of SI and to also replenish the performance security, where part of it is forfeited.

15. Indemnity

- 15.1 SI shall indemnify, protect, save, and hold PFRDA harmless from and against all claims, losses, costs, damages, expenses, action suits and other proceedings, (including reasonable attorney fees), relating to or resulting directly or indirectly from:
- (i) an act or omission of SI, its employees, its agents in the performance of the services provided by this contract, breach of any of the terms of this RFP or breach of any representation or warranty, use of the deliverables and/or services provided by SI.
 - (ii) Infringement of any patent, trademarks, copyrights etc. or such other statutory infringements in respect of all components provided to fulfil the scope of this project.
- 15.1 Any loss or damage arising out of loss of data, breach of data privacy and third-party claims on PFRDA for malfunctioning of the equipment or software or deliverables at all points of time, provided however, PFRDA notifies SI in writing in a reasonable time frame on being aware of such claim. SI has sole control of defence and all related settlement negotiations, PFRDA provides SI with the assistance, information, and authority as it deems fit to perform the above.
- 15.2 SI shall in no event enter into a settlement, compromise or makes any statement (including failure to take appropriate steps) that may be detrimental to PFRDA's (and/or its stakeholders, users, and SI) rights, interest, and reputation.
- 15.3 SI shall be responsible for any loss of data, loss of life, etc. due to acts of SI's representatives, and not just arising out of gross negligence or misconduct, etc. as such liabilities pose significant risk.
- 15.4 SI should take full responsibility for its and its employee's actions. Further, since PFRDA's data could be integrated/used under SI provided software, bidder should be responsible for loss/compromise or damage to PFRDA's data and for causing reputation risk to PFRDA.
- 15.5 SI should indemnify PFRDA (including its employees, members, or representatives) from and against claims, losses, liabilities, penalties, fines, and suits arising from:
- (i) IP infringement under any laws including Copyrights Act 1957 or IT Act 2000 and such other statutory acts and amendments thereto.
 - (ii) Negligence and misconduct of SI, its employees, and agents.
 - (iii) Breach of any terms of RFP, Representation or Warranty, this agreement or SLA.
 - (iv) Act or omission in performance of service.
 - (v) Loss of data due to any of the reasons mentioned above or violation of confidentiality clause.
 - (vi) Non-compliance of SI with Laws/Governmental/regulatory Requirements

- 15.6 In the event that PFRDA is called as a defendant for IPR infringement of patent, trademark or industrial design rights arising from use of any of the components of the supplied solution, SI on its own expense shall undertake to defend PFRDA fully.
- 15.7 It will be SI's responsibility to rapidly do away with such third-party claims. SI will also pay any compensation arising from the infringement claims and PFRDA will in no manner be responsible for such payments. In addition, SI shall bear all the related expenses and legal fees.
- 15.8 On its part, PFRDA may immediately relay to SI any such claims and help within reasonable limits to rid the claim.
- 15.9 SI must undertake that all the components delivered re free of defects, are brand new and original. If at some stage it is discovered that the components do not meet these criteria, PFRDA has the right to cancel the respective order and SI shall indemnify and refund the total amount received from PFRDA along with compensation. Similar conditions apply to software; as well the system software must be licensed and original.
- 15.10 System Integrator shall be liable to indemnify PFRDA, at its own cost and expenses, against all losses/damages, which PFRDA may suffer on account of violation by System Integrator of any or all national/international laws, norms, standards, procedures etc. in relation to provision of services and deliverable under this Agreement.
- 15.11 SI shall be solely responsible for and shall indemnify and keep PFRDA, its employees, agents, officers, and members indemnified and harmless from and against all costs (including but not limited to litigation expenses and attorney's fees), expenses, losses, liabilities, fines, penalties, damages, claims, demands, actions, or proceedings whatsoever for arising out of any death or personal injury caused by any act or omission of System Integrator, its employees, or agents. Any third-party claims for infringement of a copyright, patent, trademark or other intellectual property right of any third-party including claims made by agents of the System Integrator against PFRDA for any breach committed by the System Integrator in relation to such third parties.
- 15.12 Notwithstanding the foregoing, System Integrator shall not be obliged to indemnify PFRDA for any fault/shortcomings directly attributable to PFRDA.

16. Termination for Convenience

PFRDA, by written notice of not less than 90 (ninety) days, may terminate the Contract, in whole or in part without assigning any reason. In the event of such termination, PFRDA shall only be liable to provide payment for the Services rendered (delivered) up to the effective date of termination. In such circumstances SI shall provide all necessary assistance to PFRDA or other SI, so that the project is not adversely affected in any manner.

17. Effects of Termination

- 17.1 Upon termination of this Agreement, the Parties will comply with the Exit Management clause as specified in this Agreement.
- 17.2 If the termination is initiated before go-live, the financial settlement for the system integrator will be calculated on the basis of approved/signed off deliverables.
- 17.3 If the exit management is initiated post go-live, the financial settlement for the system integrator will be calculated on the basis of service provided during the warranty or operations and maintenance phase as applicable.

18. Minimum Wages

- 18.1 SI hereby agrees and undertakes that during the subsistence of this agreement it will not employ any personnel/individual below the Minimum Wages fixed by appropriate Government on this behalf from time to time, as per the provisions of applicable Minimum Wages law. In this effect, SI has to submit undertaking on their company letterhead signed by authorized signatory.
- 18.2 The SI will ensure strict compliance of all labour laws, insurance, minimum wages to the staff employed/deployed/engaged for the work assigned and PFRDA will not be liable for any such persons/personnel of successful bidder and shall not be liable for any levies/penalties etc. that may be imposed by the Authorities concerned for their action/inaction. There shall be no employer employee relationship whatsoever between PFRDA and the SI, their employees and SI or its employees, staff, agents will not be entitled to any employment with PFRDA. In the event of any demand/fines/Compensation made by any of the authorities on PFRDA in respect of the conduct/actions taken by SI/their employees/labourers, PFRDA will be entitled to recover the said amounts from the bills/amount payable or from the performance guarantee and also take appropriate action against said persons of SI for their misconduct.

19. Exit Management

- 19.1 Where PFRDA intends to continue equivalent or substantially similar services to the Services provided by System Integrator after termination or expiry of this Agreement, either by performing them itself or by means of a contract with New/Replacement SYSTEM INTEGRATOR, the System Integrator herein shall ensure the smooth transition to the Replacement SYSTEM INTEGRATOR and shall co-operate with PFRDA, or the Replacement SYSTEM INTEGRATOR as required in order to fulfil the obligations.
- 19.2 System Integrator shall co-operate fully with PFRDA and shall provide sufficient information to comply with the reasonable requests of PFRDA to enable an effective tendering process to take place for selection of new SI.

- 19.3 System Integrator shall comply with all reasonable requests by PFRDA to provide information relating to the operation of the Services, including but not limited to, services and software used, inter-working, coordinating with other application owners, access to and provision of all performance reports, agreed procedures, and any other relevant information (including the configurations set up for PFRDA and procedures used by System Integrator for handling Data) reasonably necessary to achieve an effective transition.
- 19.4 System Integrator shall provide to PFRDA an analysis of the Services to the extent reasonably necessary to enable PFRDA to plan migration of such workload to a Replacement SYSTEM INTEGRATOR.
- 19.5 System Integrator shall co-operate with PFRDA during the handover to a Replacement SYSTEM INTEGRATOR and such co-operation shall extend to, but shall not be limited to, inter-working, coordinating and access to and provision of all operational and performance documents, reports, summaries produced by System Integrator for PFRDA, including the configurations set up for PFRDA and any and all information to be provided by System Integrator to PFRDA under any other term of this Agreement necessary to achieve an effective transition without disruption to routine operational requirements.
- 19.6 The exit by SI would be considered as complete only upon completing all these requirements as given in this exit management document based on which final payment and all other matters will be settled. Compliance with exit management plan by SI, shall be an essence of this agreement.
- 19.7 Non-adherence to exit management plan by SI in any manner, will entitle PFRDA to seek such further damages and compensation, above the sums stipulated in this agreement, considering that continuity is required to be maintained of the project, even when the SI ceases to be part of the project, by expiry of the agreement or earlier termination thereof. SI shall be liable to compensate PFRDA on a per day basis or in any other manner, for breach on its part in implementing the exit management.
- 19.8 Notwithstanding the above, PFRDA shall be entitled to seek such remedial measures as may be warranted to secure the satisfactory performance of the SI in implementing the exit management, such that the project is not adversely affected on account of lack of continuity.

20. Transfer of Configuration Management Database

Six (06) months prior to expiry or within two (02) months of notice of termination of this Agreement System Integrator shall deliver to PFRDA a full, accurate and up to date cut of content from the Configuration Management Database (or equivalent) used to store details of Configurable Items and Configuration Management data for all products used to support delivery of the Services.

21. Transfer of Assets

- 21.1 Six (06) months prior to expiry or within two (02) months of notice of termination of the Agreement System Integrator shall deliver to PFRDA the Asset Register comprising of:
- (i) a list of all Assets eligible for transfer to PFRDA; and
 - (ii) a list identifying all other Assets, (including human resources, skillset requirement and know-how), that are essential to the delivery of the Services.
- 21.2 Within one (01) month of receiving the Asset Register as described above, PFRDA shall notify System Integrator of the Assets it requires to be transferred, (the “Required Assets”), and PFRDA and System Integrator shall provide for the approval of PFRDA a draft plan for the Asset transfer.

22. Transfer of Software Licenses

- 22.1 Six (06) months prior to expiry or within two (02) months of notice of termination of this Agreement System Integrator shall deliver to PFRDA all licenses for Software used in the provision of Services which were purchased by/for PFRDA.
- 22.2 On notice of termination of this Agreement System Integrator shall, within 2 (two) months of such notice, deliver to PFRDA details of all licenses.

23. Transfer of Software & Cloud & related services

Wherein PFRDA is the owner of the software, Six (06) months prior to expiry or within two (02) months of notice of termination of this Agreement System Integrator shall deliver, or otherwise certify in writing that it has delivered, to PFRDA a full, accurate and up to date version of the Software including up to date versions and latest releases of, but not limited to:

- a) Source Code and associated documentation.
- b) Application architecture documentation and diagrams.
- c) Release documentation for functional, technical and interface specifications.
- d) Plan with allocated resources to handover code and design to new development and test teams (this should include architectural design and code ‘walk-through’).
- e) Source Code and supporting documentation for testing framework tool and performance tool.
- f) Test results for the latest full runs of the testing framework tool and performance tool on each environment.
- g) Cloud migration plan with SOP for BCP.

24. Transfer of Documentation

Six (06) months prior to expiry or within- two (02) months of notice of termination of this Agreement System Integrator shall deliver to PFRDA a full, accurate and up-to date set of Documentation and approvals that relates to any element of the Services.

25. Transfer of Service Management Process

Six (06) months prior to expiry or within two (02) months of notice of termination of this Agreement System Integrator shall deliver to PFRDA but not limited to:

- (i) a plan for the handover and continuous delivery of the Service full and up to date, both historical and outstanding Service Desk ticket data including, but not limited to:
 - a) Incidents.
 - b) Problems.
 - c) Service Requests.
 - d) Changes.
 - e) Service Level reporting data.
- (ii) List and topology of all tools and products associated with the provision of the Software and the Services.
- (iii) Full content of software builds and server configuration details for software deployment and management, and monitoring software tools and configuration.

26. Transfer of Knowledge Base

Six (06) months prior to expiry or within two (02) months of notice of termination of this Agreement System Integrator shall deliver to PFRDA a full, accurate and up to date cut of content from the knowledge base (or equivalent) used to troubleshoot issues arising with the Services but shall not be required to provide information or material which System Integrator may not disclose as a matter of law.

27. Transfer of Service Structure

Six (06) months prior to expiry or within two (02) months of notice of termination of this Agreement System Integrator shall deliver to PFRDA a full, accurate and up to date version of the following, as a minimum archive of records

- (i) Programme plan of all work in progress currently accepted and those in progress.
- (ii) Latest version of documentation set.
- (iii) Source Code (if appropriate) and all documentation to support the services build tool.
- (iv) Source Code, application architecture documentation/diagram and other documentation.

- (v) Project plan and resource required to hand Service Structure capability over to the new team.

28. Training Services on Transfer

- 28.1 System Integrator shall comply with PFRDA's reasonable request to assist in the identification and specification of any training requirements following expiry or termination. The purpose of such training shall be to enable PFRDA or a Replacement SYSTEM INTEGRATOR to adopt, integrate and utilize the Data and Assets transferred and to deliver an equivalent service to that previously provided by System Integrator.
- 28.2 System Integrator shall produce for PFRDA's consideration and approval Six (06) months prior to expiry or within two (02) months working days of issue of notice of termination:
 - a) A training strategy, which details the required courses and their objectives.
 - b) Training materials (including assessment criteria); and
 - c) a training plan of the required training events.
- 28.3 System Integrator shall schedule all necessary resources to fulfil the training plan and deliver the training.

29. Transfer Support Activities

- 29.1 Six (06) months prior to expiry or within two (02) months of issue of notice of termination, System Integrator shall assist PFRDA or Replacement SYSTEM INTEGRATOR to develop a viable exit transition plan which shall contain details of the tasks and responsibilities required to enable the transition from the Services provided under this Agreement to the Replacement SYSTEM INTEGRATOR or PFRDA, as the case may be.
- 29.2 The exit transition plan shall be in a format to be agreed with PFRDA and shall include, but not be limited to:
 - a) Timetable of events
 - b) Resources
 - c) Assumptions.
 - d) Activities.
 - e) Responsibilities
 - f) Risks.
- 29.3 System Integrator shall supply to PFRDA or a Replacement SYSTEM INTEGRATOR specific material including but not limited to:
 - a) Change Request log.
 - b) Entire back-up history.
 - c) Incident logbook
 - d) Asset Register, problem management system and operating procedures

29.4 On the date of expiry System Integrator shall provide to PFRDA refreshed versions of the materials which shall reflect the position as at the date of expiry.

30. Training, handholding, and knowledge transfer

30.1 The System Integrator shall hold technical knowledge transfer sessions with designated team of PFRDA and/or any designated agency in the last three (03) months of the project duration.

30.2 The System Integrator shall hold operational hand-holding sessions on the Application software with the designated officers/staff members of PFRDA, so that PFRDA can continue with the application even after System Integrator exits the project.

31. Limitation of Liability

31.1 System Integrator shall not be liable or responsible for any delay or failure to perform the Services or failure of the Services or a Deliverable to the extent that such delay or failure has arisen as a result of any direct delay or failure by PFRDA to perform any of its obligations (other than payment of disputed amounts) which directly affects the performance of SI, or its obligations, for lack of clarity or decision to be given by PFRDA. In the event that SI is delayed or prevented from performing its obligations due to such failure or delay on the part of or on behalf of PFRDA, then the SI may be allowed an additional period of time to perform its obligations and unless otherwise agreed the additional period shall be equal to the amount of time for which SI is delayed or prevented from performing its obligations due to such direct failure or delay on the part of or on behalf of PFRDA. Such failures or delays shall be brought to the notice of PFRDA, immediately within two (02) days of occurrence of such failures or delays and subject to mutual agreement with PFRDA, the SI shall take such actions as may be necessary to correct or remedy the failures or delays such that performance of the project is not adversely affected.

31.2 Notwithstanding anything contained in this Agreement the total cumulative liability of SI/either partly arising from or relating to this Contract shall not exceed the total amount paid/payable till date to the SI by PFRDA under this Agreement (excluding the taxes, reimbursements etc.) provided, however, that this limitation shall not apply to any liability for damages/compensation arising from breach of SI's obligations affecting the project adversely to the detriment of PFRDA (a) wilful default/deliberate inaction/fraud by SI or (b) indemnification claims by third party for infringement against PFRDA.

32. Force Majeure

- 32.1 Notwithstanding the provisions of terms and conditions contained in the RFP and or Agreement, neither party shall be liable for any delay in performing its obligations herein if and to the extent that such delay is the result of an event of Force Majeure.
- 32.2 For the purposes of this clause, 'Force Majeure' means and includes wars, insurrections, revolution, civil disturbance, riots, terrorist acts, public strikes, bundh, fires, floods, epidemic, Vis Major, acts of Government in their sovereign capacity, but does not include any foreseeable events, commercial considerations or those involving fault or negligence on the part of the party claiming Force Majeure.
- 32.3 If a Force Majeure situation arises, System Integrator shall promptly notify PFRDA in writing of such condition and the cause thereof. Unless otherwise directed by PFRDA in writing, System Integrator shall continue to perform its obligations under the Contract as far as is reasonably practical and shall seek all reasonable alternative means for performance not prevented by the Force Majeure event.
- 32.4 If the force majeure situation persists for an indefinite period, beyond 60 days, the parties shall consult each other on further actions necessary to salvage the project.

33. Notices

Any notice given by one party to the other pursuant to this Contract shall be sent to other party in writing and to be confirmed in writing to other Party's address. The notice shall be effective when delivered or on the notice's effective date whichever is later.

34. Confidentiality

- 34.1 Subject to the NDA executed between the parties, In the course of performing its functions and obligations under this Agreement, System Integrator shall maintain strict secrecy, confidentiality and privacy in respect of the confidential records and information that has come to its possession or knowledge.
- 34.2 System Integrator shall keep utmost confidentiality of the details and information with regard to the Project, including systems, facilities, operations, management, and maintenance of the systems.
- 34.3 It is agreed between PFRDA and System Integrator that PFRDA has a right to prevent or prohibit System Integrator at any time from disclosing any information and records to any person and System Integrator shall abide by such decision and when disclosure is required or by due process of law it shall give prior notice to PFRDA.
- 34.4 System Integrator agrees that it shall ensure that all its employees, agents, System Integrators and any another related stakeholder are bound by nondisclosure agreement and shall provide the same as per the terms stated in RFP.

35. Liquidated Damages/Compensation

- a. If the System Integrator fails to deliver product/services satisfactorily within the stipulated time schedule as specified in this RFP/Agreement, or as may be modified, PFRDA may, without prejudice to its other remedies under the RFP/Agreement, and unless otherwise extension of time is agreed upon (without the application of liquidated damages/compensation), deduct from the Project Cost, such liquidated damages/take compensation as defined in SLA and Liquidated Damages/Compensation in [Appendix-IV](#) of RFP.
- b. Once the maximum deduction is reached, PFRDA may consider termination of the Agreement. This shall be without prejudice to rights of PFRDA to terminate the contract at any time, if the SI is in breach of its obligation such that the project is being adversely affected in the opinion of PFRDA. This liquidated damages/compensation may also be adjusted from any payment due to be given to SI, or from the performance security submitted by SI or PFRDA may directly notify SI to pay the same.
- c. PFRDA expects that SI completes the scope of work within the timeframe. Inability of SI to either provide the requirements as per the scope or to meet the timelines as specified would be treated as breach of contract and would invoke the liquidated damages/compensation clause as defined in SLA and Liquidated Damages/Compensation in [Appendix-IV](#) of RFP. Thereafter, at the discretion of PFRDA, the contract may be cancelled. PFRDA may also invoke the Performance Guarantee.
- d. SI should ensure implementation of the software application with all the functional, technical and security requirements as specified in the RFP document.
- e. Notwithstanding anything contained above, no such compensation will be chargeable on SI for the inability occasioned, if such inability is due to reasons entirely attributable to PFRDA.
- f. Compensation payable by SI will be recovered from the bills. No payment due will be released/adjusted before compensation due is paid by SI.
- g. There would be no payment for man-days invested in removing defects in developments.
- h. Non-adherence to exit management plan by SI in any manner, will entitle PFRDA to seek such further damages and compensation, above the sums stipulated in this agreement, considering that continuity is required to be maintained of the project, even when the SI ceases to be part of the project, by expiry of the agreement or earlier termination.

36. Intellectual Property Rights and Ownership Provisions:

- 36.1 Ownership of Custom Software/Customizations: All Custom Software or customizations developed exclusively for PFRDA under this Agreement shall be deemed works made for hire. PFRDA shall exclusively own all rights, title, and

- interest worldwide in such Custom Software or customizations, including all associated intellectual property rights.
- 36.2 Waiver of Moral Rights: The Solution Integrator (SI) and its representatives expressly waive any moral rights in the Custom Software developed under this Agreement.
- 36.3 Assistance in Securing Rights: The SI shall provide PFRDA with all necessary assistance, including executing documents or directing its employees to do so, to secure rights related to any Custom Software, such as patent or copyright applications.
- 36.4 Acknowledgement of SI's Proprietary Materials: PFRDA recognizes that the SI may use proprietary materials in performing services, which remain the SI's intellectual property. However, if such materials are embedded in the deliverables, the SI grants PFRDA a non-exclusive license for its use without any other cost on PFRDA.
- 36.5 Third-party Software: The SI must not use third-party software that isn't commercially available to PFRDA on reasonable terms. All necessary software and hardware must be disclosed to PFRDA and SI should procure all such licenses and software that are required for successful execution of the project, at its own costs.
- 36.6 Infringement Remedies: If a deliverable infringes third-party intellectual property rights, the SI will, at its expense, either modify the deliverable to be non-infringing or obtain a license for PFRDA's continued use, at SI's costs.

37. Disputes/Arbitration

- 37.1 Any and all disputes between the Parties arising out of or in Connection with this Agreement, or its performance, or touching any aspect thereof shall, so far as possible, be settled amicably among the parties within 30 days after receipt of notice thereof from the party raising the dispute. In case the Parties fail to reach an amicable settlement, any and all disputes between the Parties arising out of or in Connection with this Agreement or its performance, or touching any aspect thereof shall be settled by way of arbitration to be conducted under the provisions of the Arbitration and Conciliation Act, 1996, as amended from time to time, by a sole arbitrator to be appointed with the consent of both the parties. Failing any agreement to appoint a sole arbitrator as aforesaid, each party shall appoint one arbitrator, and the two appointed arbitrators shall appoint a third arbitrator, who shall act as the presiding arbitrator. Any further proceedings out of or in relation to such arbitration proceedings, which either party to this agreement may wish to initiate against the other, shall be instituted in courts at New Delhi only.
- 37.2 System Integrator shall continue work under the Contract during the arbitration proceedings unless otherwise directed by PFRDA or unless the matter is such that the work cannot possibly be continued until the decision of the arbitrator is obtained.

- 37.3 Arbitration proceeding shall be held in Delhi, India, and the language of the arbitration proceedings and that of all documents and communications between the parties shall be in English.
- 37.4 Subject to the arbitration clause, only the Courts at New Delhi shall have exclusive jurisdiction to try any disputes arising between the parties, under this agreement or touching any aspect thereof.

38. Amendment

Any amendment to this Agreement shall be made with by mutual written consent of both the Parties.

39. Miscellaneous

- 39.1 The personnel assigned by System Integrator to perform the Services shall be employees of System Integrator, and under no circumstances shall such personnel be considered employees of PFRDA. The System Integrator shall have the sole responsibility for the supervision and control of the personnel deployed in the Project and for payment of such personnel's compensation, including salary, withholding of income taxes and social security taxes, worker's compensation, employee, and disability benefits and the like and shall be responsible for all obligations of an employer subject to Applicable Law.
- 39.2 The System Integrator shall use its best efforts to ensure that sufficient System Integrator personnel are assigned to perform the Services and that such personnel have appropriate qualifications to perform the Services. After discussion with System Integrator, PFRDA shall have the right to require the removal or replacement of any System Integrator personnel performing work under this Agreement based on bona fide reasons. In the event that PFRDA requests that any System Integrator personnel be replaced, the substitution of such personnel shall be accomplished pursuant to a mutually agreed upon schedule.
- 39.3 In the event that PFRDA and System Integrator identify any personnel of System Integrator as "Key Personnel", then the System Integrator shall not remove such personnel from the Project without the prior written consent of PFRDA unless such removal is the result of an unavoidable circumstance including but not limited to resignation, termination, medical leave, etc.
- 39.4 Each Party shall be responsible for the performance of all its obligations under this Agreement or the SLA as the case may be and shall be liable for the acts and omissions of its employees and agents in Connection therewith.

This Agreement shall be with effect from <<dd/mmm/yyyy>>.

In WITNESS WHEREOF the parties hereto have executed this Agreement as of the day and year herein above written.



SIGNED for and on behalf of
PFRDA, (PFRDA)

By Sh.

Signature _____

Witness _____

Name:

Place:

Date:

SIGNED for and on behalf of
System Integrator (SI)

By Sh.

Signature _____

Witness _____

Name:

Place:

Date:

1. The SLA
<<As per Appendix IV (SLA & and LD/Compensation) of the RFP>>
2. RFP Document
<<Published RFP document including corrigendum/Addendum, if any>>
3. BID Response from SI
<<Bid response from SI will be placed here>>
4. Schedules and Annexures to this agreement.

SCHEDULE I: Implementation Timelines

The total duration for the project will be of **Five (05) years** from the date of the award of the contract comprising of **One (01) month** of (Requirement Gathering, Project Plan development, Design and Architecture Blueprint), **Three (03) months** of development (Enterprise-grade CMS Implementation, Website Design and Development, UI/UX Enhancement, Data & Content Migration, Security and Compliance Integration), **Two (02) months** for testing & go-live (Functional Testing, UI/UX Testing, Security and Compliance Testing, Performance and Load Testing, Final Review and Approval, Production Environment Setup, Go-live), **Six (06) months** of warranty & stabilisation from the date of Go-live and AMC for **Forty-Eight (48) month** from the date of end of warranty.

| Sl. No | Milestones | Activities/Deliverables | Timelines |
|--------|--|---|-----------|
| 1 | Issue of Letter of Intent/Award | Work Order | - |
| 2 | Signing of Agreement/Contract | Within 10 days of receiving the Letter of intent (LoI) from PFRDA | T |
| 3 | Start-Off/Kick-off Meeting | Project Kick-off Meeting/Stakeholder Engagement Formation of Project Team Requirement Analysis Submission of Project Charter | T+ 2W |
| 4 | Requirement gathering, Planning and Design | Project Plan Development Migration, Design and Architecture Blueprint | T+4W |
| 5 | Development and Integration | Website Design and Development Enterprise-grade CMS Implementation UI/UX Enhancement Data & Content Migration Security and Compliance Integration | T+16W |
| 6 | Testing and Quality Assurance | Functional Testing UI/UX Testing Security and Compliance Testing Performance and Load Testing UAT | T+20W |
| 7 | Deployment & Go Live | Final Review and Approval Production Environment Setup Go-Live | T+24W |
| 8 | Post-Launch Stabilization and Warranty | User Support Monitoring and Analytics Bug Fixes | T+48W |
| 9 | Technical Support, Facility Management & | Ongoing Maintenance and Updates Operations & Maintenance Support | T + 240W |

AMC (Year 2, 3 ,4,
5)

In case of delay in completion of milestone(s) due to any reason (other than on account of any delay attributable to PFRDA) which is likely to result in enhancement of time duration for submission of the respective deliverables, in such an event, the tenure of the contract may be extended, at the instance of PFRDA. The SI shall be required to fulfil its obligations, without any additional cost to PFRDA.

SCHEDULE II: Indicative Required Solution Features

1. Functional/Feature Requirements

1.1 Website requirements

| Sr. No | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization, 3rd Party Integration, Not Available) |
|--------|--|-------------------------------|---|
| 1. | <p>Enhance Information Architecture: Optimize the organization of information by prioritizing content based on user needs and access frequency. In discussion with PFRDA, the bidder will design a new, streamlined Information Architecture that prioritizes content, enhances discoverability, and delivers an optimal user experience.</p> | Business Critical | |
| 2. | <p>Develop a Structured Information Framework: Architect a hierarchical information model that enables intuitive and efficient content discovery.</p> | Business Critical | |
| 3. | <p>Craft a User-Centric Presentation Framework: Design a presentation structure that aligns with user journeys, facilitating clear understanding and seamless navigation.</p> | Business Critical | |
| 4. | <p>Design an Integrated Navigation System: Establish a cohesive navigation framework that ensures easy access to all levels of the information hierarchy across the user interface.</p> | Business Critical | |

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| 5. | Enhance Content Strategy and User Engagement: Leverage strategic planning, data-driven insights, and user-centric design principles to optimize content effectiveness, in close collaboration with PFRDA. | Business Critical | |
| 6. | Ensure Synergy and Consistency Across Platforms: Maintain a cohesive brand experience across all digital channels. | Business Critical | |
| 7. | Colour Scheme: The website's colour palette should reinforce the PFRDA's branding while appealing to users and encouraging them to engage across platforms. The bidder should employ a colour scheme that is both aesthetically pleasing and aligned with the brand identity. | Business Critical | |
| 8. | Visual Engagement: Utilize images, videos, icons, infographics, and graphical data strategically to enhance user engagement and minimize reliance on dense textual content, thereby improving overall user experience. | Business Critical | |
| 9. | Optimized Navigation: Design the website to enable users to effortlessly locate desired information with minimal clicks and no confusion. | Business Critical | |
| 10. | Clutter-Free: Streamlined to avoid overwhelming users. | Business Critical | |
| 11. | Internally Linked: Featuring strong internal linking and reverse navigation capabilities. | Business Critical | |
| 12. | Informative Headers and Footers: Providing users with clear, valuable information to | Business Critical | |

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| | guide their journey through the site | | |
| 13. | <p>Error Handling: The website should provide clear, specific error messages to enhance user understanding of its functions. This includes:</p> <p>(1) 301 Error Auto-Redirection: Automatically redirect users when pages are removed or renamed.</p> <p>(2) 404 Error Management: Ensure proper handling of 404 errors to guide users back on track.</p> | Business Critical | |
| 14. | <p>Logical & Hierarchical Sitemap: The website should facilitate seamless navigation for both users and search engines by implementing a well-structured sitemap that organizes pages hierarchically by topic.</p> | Business Critical | |
| 15. | <p>Social Media Integration: Enable users to easily share content across social media platforms like Facebook and Twitter. If applicable, bidders should specify any third-party plugin integrations required.</p> | Business Critical | |
| 16. | <p>Subscription Options: Provide users with the ability to subscribe to receive email and push notifications for updates on topics of their choice.</p> | Business Critical | |
| 17. | <p>Accessibility and Compliance: Ensure the website is fully compliant with the World Wide Web Consortium (W3C) and Web Content Accessibility Guidelines (WCAG) 2.2 at Level AA, as well as the Government of India Guidelines (GIGW) for websites</p> | Business Critical | |

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| 18. | Quality Certification: Design the website to achieve the Certified Quality Website Certification from STQC, adhering to all relevant standards. | Business Critical | |
| 19. | Internationalization: Incorporate W3C Internationalization Guidelines into the website solution to ensure global accessibility. | Desirable | |
| 20. | Website solution should take into consideration W3C Guidelines on Internationalization | Business Critical | |
| 21. | Standards Compliance: Ensure that the website content and design are compliant with W3C XHTML and CSS standards. The website design should also adhere to Nielsen and Molich's 10 User Interface Design Guidelines. | Business Critical | |

1.2 Search Capability

| Sr. | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization, 3rd Party Integration, Not Available) |
|-----|--|-------------------------------|--|
| 22. | Comprehensive Search Functionality: Enable keyword searches across all content types, including documents, videos, audio, images, and other media, leveraging file names, tags, metadata, and the text content, regardless of location or format. | Business Critical | |
| 23. | Advanced Search Capabilities: Provide the ability to define and perform advanced searches by setting parameters such as document | Business Critical | |

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| | type, format (e.g., docx, pdf, xls etc), or categories in advance. | | |
| 24. | Filter and Sort Options: Implement filtering and sorting options within the user interface to refine search results effectively. | Business Critical | |
| 25. | Historic Content Search: Support search functionality across current, historical, and archived content. Allow users to view previously searched keywords and maintain a search history. | Business Critical | |
| 26. | Search Suggestions: Incorporate a "Suggestions" feature that displays frequently searched items, associated keywords, and corrects spelling errors. | Business Critical | |
| 27. | Document Content and Metadata Search: Enable searches within the content of documents, including PDFs, Word, Excel, and PowerPoint files. Support the ability to search metadata associated with digital assets. | Business Critical | |
| 28. | Bi-Language Search: Provide search functionality across all applicable languages (e.g., English, Hindi) for bi-lingual sites and portal instances. | Business Critical | |
| 29. | Faceted and Personalized Search: Offer faceted or personalized search capabilities, allowing users to refine search results instantly by applying specific constraints that match their criteria. | Business Critical | |
| 30. | Data Indexing and Versioning: Support full-text search, versioning, and event- | Business Critical | |

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| | driven indexing to ensure search results are updated in real-time. | | |
| 31. | Search Result Weighting: Provide the ability to control and adjust the weighting of search results through the Content Management System (CMS). | Business Critical | |
| 32. | Synonym Management: Enable the setup of synonyms or equivalent terms to enhance search accuracy. | Business Critical | |
| 33. | Customizable Search Rankings: Offer the ability to customize search result rankings to prioritize important topics. | Business Critical | |
| 34. | Search Engine Index Management: Include provisions to manage and control how content is indexed by search engines. | Business Critical | |
| 35. | Spell Checking and Near Matches: Implement spell-checking features that present near matches in the search results. | Business Critical | |
| 36. | Third-Party Search Engine Integration: Ensure the capability to integrate with a third-party search engine if required. | Desirable | |

1.3 Content Management System

| Sr. | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization, 3rd Party Integration, Not Available) |
|-----|---|-------------------------------|--|
| 37. | Intuitive CMS Interface: The CMS should feature a user-friendly and intuitive interface, accommodating users of varying technical expertise. | Business Critical | |
| 38. | User and Role Management: Allow the creation and management of users, user groups, departments, organizations, and locations. Define specific roles and permissions for users, including page-wise, section-wise, component-wise, and module-wise access controls (e.g., Create, Update, Delete, View, Review, Publish). | Business Critical | |
| 39. | Authorization Matrix: Implement an authorization matrix that maps users to specific roles, with robust access controls and user management services, including proper grouping and rights allocation. | Business Critical | |
| 40. | Non-Technical Authoring: Enable site administrators to easily edit or extend structured authoring web pages and templates without requiring coding skills, using a point-and-click interface for template management. | Business Critical | |
| 41. | Enforced Consistency: Provide the ability to enforce the use of pre-defined themes, templates, and style guidelines to ensure a consistent look and feel throughout content entry and viewing. | Business Critical | |

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| 42. | Reusable Components: Offer pre-designed, reusable components, modules, and widgets for rapid creation of static and dynamic pages. | Business Critical | |
| 43. | WYSIWYG Editing: Support drag-and-drop content organization and editing through a What You See Is What You Get (WYSIWYG) interface, including in-context features for content authors. | Business Critical | |
| 44. | Single-Page App Management: Allow the editing and management of Single-Page Applications (SPAs) using the same drag-and-drop editor used for websites. | Business Critical | |
| 45. | Omnichannel Support: Accommodate omnichannel content publishing across web, mobile, social media, etc., and support personalized experiences across digital touchpoints. | Desirable | |
| 46. | Responsive and Adaptive Design: Ensure full responsive and adaptive design compatibility, including integration support for Progressive Web Applications. | Business Critical | |
| 47. | Content Versioning: Provide multi-level undo/redo functionality, version comparison, and version history, with the ability to recover deleted or expired content. | Business Critical | |
| 48. | Multisite Management: Support the management of multiple sites within a global hierarchy, including multiple versions of the same site and multilingual capabilities (English, Hindi, and 12 regional languages). | Desirable | |
| 49. | Translation Support: Offer machine and manual translation options, including integration with external services and ensure Unicode compliance. | Business Critical | |

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| 50. | Content Reusability: Enable content reuse across multiple sites, pages, and channels, with standardized styling and design through predefined templates. | Business Critical | |
| 51. | Content Scheduling: Allow content scheduling, including the ability to set publication and expiration dates/times for specific content components. | Business Critical | |
| 52. | Content Archive and Retrieval: Provide archiving capabilities for content, sections, and pages, with filtering options by date/month/year. | Business Critical | |
| 53. | Content Type Support: Accommodate various content types, including .txt, HTML, PDF, MS-Word, XML, graphics, audio, and rich media, with compliance to the latest Darwin Information Typing Architecture (DITA) standards. | Business Critical | |
| 54. | Engagement Tools: Offer tools for creating multiple-choice polls, engaging forms, surveys, and real-time reporting, with options for both closed and open group levels. | Business Critical | |
| 55. | Email and Push Notifications: Provide capabilities for creating email templates and sending newsletters and push notifications across platforms, with customization and automated options. | Business Critical | |
| 56. | Alerts and Announcements: Facilitate broadcast updates and targeted announcements to specific user groups across sites. | Business Critical | |
| 57. | SEO Optimization: Incorporate Search Engine Optimized metadata and keyword authoring, along with HTML editing capabilities and metadata association with content assets. | Business Critical | |
| 58. | Responsive Rendering: Ensure responsive and adaptive rendering that optimizes images for screen size | Business Critical | |

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| | and network speed, addressing both experience and performance. | | |
| 59. | Bulk Content Management: Support bulk import, export, and metadata management, along with content indexing and cross-referencing. | Business Critical | |
| 60. | Rule Engine Support: Provide a user-friendly rule engine for component-level customization and advanced caching mechanisms for offline content viewing. | Business Critical | |
| 61. | Content Distribution: Facilitate content sharing on social media platforms and offer social channel content distribution with a preview of content presentation. | Desirable | |
| 62. | Metadata and Tagging: Support automatic tagging of images and documents, bulk metadata application, and content categorization. | Business Critical | |
| 63. | Site Rollback and Change Tracking: Offer rollback capabilities and track changes in the authoring/editing process, including support for private pages accessible only to authorized users. | Business Critical | |
| 64. | Image Optimization: Auto-resize images and generate thumbnails based on device and network conditions, ensuring optimal performance. | Business Critical | |
| 65. | PDF Conversion: Provide solutions for converting PDF to HTML and vice versa with minimal turnaround time, ensuring full editability of converted content. | Business Critical | |
| 66. | SEO Optimization: Streamline sitemap updates and metadata to ensure new pages are searchable by external search engines. | Business Critical | |

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| 67. | Content Reuse and Rule Management: Facilitate content reuse across multiple pages and support rule creation at the component level for customized user experiences. | Business Critical | |
| 68. | Caching and Offline Access: Implement advanced caching for offline content access and provide content to third parties in standard formats like XML and JSON. | Business Critical | |
| 69. | RSS Feed Management: Enable users to receive dynamically updated content digests, with customizable display options for topics and articles. | Business Critical | |
| 70. | Auto-Save and UI Framework Support: Ensure an auto-save feature for content and compatibility with the latest third-party UI frameworks like Bootstrap, jQuery, ReactJS, and AngularJS. | Business Critical | |
| 71. | User Interaction and Feedback: Allow users to leave comments, ratings, and report inappropriate content, with backend notifications for administrators to take necessary actions. | Business Critical | |
| 72. | Reduced Publishing Time: Optimize content publishing processes, incorporating grammar and spelling checks | Desirable | |
| 73. | Content Moderation: Implement a content moderation system to flag inappropriate or objectionable keywords before publication. | Business Critical | |
| 74. | Mobile Responsiveness: Ensure the CMS is fully responsive and accessible across mobile, tablet, and desktop devices. | Business Critical | |

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| 75. | Content Translation Mapping: Support content translation mapping, with notifications for content owners/authors when updates are pending in mapped languages and provide admin views for tracking updates. | Desirable | |
| 76. | Data Visualization: Enable content authors to upload Excel files for specific pages, with the ability for end-users to view data visualizations on the website and PWA, | Business Critical | |

1.4 Workflow Management

| Sr. no | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization, 3rd Party Integration, Not Available) |
|--------|--|-------------------------------|---|
| 77. | Customizable Workflow Design: Ability to define any number of simple to complex business processes/workflows, leveraging users, groups, and roles to align with organizational needs. | Business Critical | |
| 78. | Task Management: Provide the capability to define and assign tasks to users, with the ability to set due dates and timelines for entire workflow processes as well as individual tasks. | Business Critical | |
| 79. | Workflow Replication: Allow replication, cloning, and modification of existing workflows, streamlining the creation of similar processes. | Business Critical | |
| 80. | Advanced Workflow Support: Support parallel, nested, conditional, rule-based, and ad-hoc workflows to accommodate diverse business scenarios. | Business Critical | |

| Sr. no | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization, 3rd Party Integration, Not Available) |
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| 81. | Outlook Integration: Facilitate seamless integration of workflows with Outlook, enabling automated email notifications and updates. | Business Critical | |
| 82. | Content Approval Process: Implement a content approval and rejection process that includes the ability to comment and provide feedback where necessary, ensuring clarity and accountability. | Business Critical | |
| 83. | Task Tracking: Enable tracking of users, their tasks, and assignments within workflows, ensuring visibility and accountability at every stage. | Business Critical | |
| 84. | Real-Time Workflow Analytics: Provide real-time analytics for all instances of open and in-progress processes, allowing for the identification of operational bottlenecks and insights to optimize efficiency. | Business Critical | |
| 85. | Automated Alerts: Set up alerts to notify users when tasks are overdue, with the ability to send reminders at regular and predefined intervals. | Business Critical | |
| 86. | Workflow Status Management: Define and manage workflow statuses (e.g., review, approved, not approved, pending approval, not submitted for approval), with easy search functionality for status tracking. | Business Critical | |
| 87. | Personalized Task Lists: Provide users participating in review or approval workflows | Business Critical | |

| Sr. no | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization, 3rd Party Integration, Not Available) |
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| | with a personalized task list that includes task descriptions, assigners, and completion timelines, ensuring clear task management. | | |
| 88. | Audit Trails: Maintain detailed logs and audit trails for every workflow activity, ensuring transparency and accountability throughout the process. | Business Critical | |

1.5 Digital Asset Management / Content Repository Hub

| Sr. | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization, 3rd Party Integration, Not Available) |
|-----|---|-------------------------------|--|
| 89. | Unified Digital Asset Repository: Establish a centralized repository for documents, videos, audio, images, and other media types, accessible enterprise-wide, within specific groups, or by individual users, serving as a comprehensive web repository. | Business Critical | |
| 90. | Workflow Integration: Ensure that digital assets can seamlessly participate in workflow processes, enhancing operational efficiency. | Business Critical | |

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| 91. | Collaborative Asset Management: Facilitate the creation, sharing, and commenting on assets by registered users, fostering collaboration in scenarios where multiple users work on a single asset. | Business Critical | |
| 92. | Advanced Search Capabilities: Provide robust search options with advanced filters, keyword management, and hierarchical keyword support to enhance the discoverability of digital assets. | Business Critical | |
| 93. | Comprehensive Asset Search: Enable searching for documents, videos, audio, images, and other media types based on keywords, file names, content descriptions, tags, metadata, asset usage rights/policies, and text content. | Business Critical | |
| 94. | Brand and Media Support: Support the storage and manipulation of graphics, such as the PFRDA brand logo, for consistent presentation across multiple devices and locations. | Business Critical | |
| 95. | Optimized Media Handling: Ensure efficient handling of images and multimedia (including audio, video, and Flash), with minimal load times, especially considering on-premises server setups. | Business Critical | |
| 96. | Image Editing: Provide ability for resizing, rotating, and cropping images to meet specific requirements. | Business Critical | |
| 97. | Asset Review and Approval: Support the review, approval, rejection, and annotation of digital assets, ensuring quality control and compliance. | Business Critical | |

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| 98. | <p>Custom Metadata Management: Allow the application of custom metadata to digital assets, both individually and in bulk, enabling better organization and retrieval.</p> | Business Critical | |
| 99. | <p>Custom Metadata Configuration: Offer the ability to configure custom metadata fields, such as asset ratings, favourites, and descriptions, to meet specific organizational needs.</p> | Business Critical | |
| 100. | <p>Automated Media Formatting: Automatically format images and other rich media according to predefined standards for resolution and size, ensuring consistency across platforms (e.g., Banner images).</p> | Business Critical | |
| 101. | <p>Version Upgrade Capability: Provide the ability to simultaneously upgrade versions of assets across multiple platforms, ensuring consistency and up-to-date content across the enterprise.</p> | Business Critical | |

1.6 Analytics & Reporting

| Sr. | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization, 3rd Party Integration, Not Available) |
|------|--|-------------------------------|--|
| 102. | Visitor Tracking Across Platforms: Monitor and analyse visitor counts across the Website, Progressive Web Apps (PWA), Mobile (Android/iOS), Tablet, and various browsers to gain basic insights into usage trends, seasonal variations, and content popularity. | Business Critical | |
| 103. | Top Pages Analysis: Provide visibility into the most visited pages, enabling quick sorting and reference based on visit counts. | Business Critical | |
| 104. | Individual Page Metrics: Track visit counts and session durations on individual pages, offering insights into the average time visitors spend on each page. | Business Critical | |
| 105. | Anonymous Visitor Insights: Detect and analyse anonymous visitors' device details, and location at the city/state level, with visitor statistics viewable on a world map by country, region, or city. | Business Critical | |
| 106. | Exit Page Analysis: Analyse page-wise exit rates to determine how often visitors leave the site from specific pages, helping identify potential issues. | Business Critical | |

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| 107. | Traffic Source Analysis: Track and display the channels and sources of website traffic, including Direct, Organic search, Referral, Email, Paid search, other advertising, Social, and Display. | Business Critical | |
| 108. | Traffic Path Visualization: Filter and visualize traffic paths, easily identifying sources and interactions with assets at each touchpoint. | Desirable | |
| 109. | Segmentation and Reporting: Create instant breakdowns, segments, cohorts, and alerts for analysis. Perform flow and fallout analysis and generate detailed reports. | Desirable | |
| 110. | Page Speed Monitoring: Display average and maximum page speeds over time in the analytics dashboard, aiding in performance optimization. | Business Critical | |
| 111. | Bounce Rate Tracking: Measure the bounce rate of single-page visits to assess visitor engagement. | Business Critical | |
| 112. | Digital Asset Analytics: Track and visualize engagement levels for digital assets and web content, offering asset-specific reports and insights into usage and engagement. | Business Critical | |
| 113. | Segmented Analysis: Support analysis across different segments, compare segments, and generate reports for varying time periods, including metric comparisons. | Desirable | |

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| 114. | Cohort Analysis: Create and compare groups of visitors with shared characteristics or behaviours over time to identify significant trends. Leverage this analysis to provide relevant content suggestions and enhance customer experiences. | Desirable | |
| 115. | Comprehensive Data Integration: Pull data from multiple sources to create in-depth analytics, offering a single view of known users. Visualize customer data, build dynamic segments, and analyse both segments and individual behaviours. | Desirable | |
| 116. | Visitor Segmentation: Classify visitors into segments based on interaction data and system data for targeted engagement strategies. | Desirable | |

1.7 Progressive Web Application Requirements

Below is the list of indicative general features that are expected to be as part of PWA development:

| Sr. | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization, 3rd Party Integration, Not Available) |
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| 117. | Offline Functionality: Ensure that selected pages and sections of the Progressive Web App (PWA) remain operational even when users are offline or experiencing unreliable or slow internet Connections. | Business Critical | |

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| 118. | <p>Search Engine Discoverability: Design the PWA to function like a standard website, enabling it to be indexed by search engines for improved discoverability.</p> | Business Critical | |
| 119. | <p>Push Notifications: Implement push notification capabilities in the PWA that remain functional even when the browser is closed, or the app is inactive.</p> | Business Critical | |
| 120. | <p>Background Data Synchronization: Support background data and content synchronization using service workers to ensure content is updated seamlessly.</p> | Business Critical | |
| 121. | <p>Responsive Design: Ensure the PWA is fully responsive, providing an optimal user experience across all screen sizes, including mobile, tablet, and desktop devices.</p> | Business Critical | |
| 122. | <p>Security: Serve the PWA via HTTPS to safeguard against snooping and ensure that content integrity is maintained.</p> | Business Critical | |
| 123. | <p>Efficient Loading: Optimize the PWA for faster performance post-initial load, preventing the need to re-download content and page elements with each visit.</p> | Business Critical | |
| 124. | <p>Installable and Linkable: Enable users to add the PWA to their home screen from the website, allowing it to be launched like a native app icon. Ensure the PWA can be easily shared via URL, without requiring complex installation procedures.</p> | Business Critical | |

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| 125. | Automatic Updates: Allow for immediate implementation of patches and updates by publishers, ensuring users always have access to the most current version of the application. | Business Critical | |
| 126. | Mobile App-Like Experience: Design the PWA to emulate the navigation and interaction patterns of native mobile apps, providing a familiar and seamless user experience. | Business Critical | |
| 127. | Accessibility Compliance: Ensure the PWA meets WCAG 2.2 accessibility requirements, making all user interactions fully accessible to individuals with disabilities. | Business Critical | |

2. Non-Functional Requirements

2.1 Security requirements

2.1.1 Secure Design

| Sr. | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization, 3rd Party Integration, Not Available) |
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| 128. | Security Controls and Compliance Standards - Develop, implement, and maintain industry-leading security controls to prevent misuse of information systems, ensuring the confidentiality, integrity, and availability of these systems. Adhere to established industry frameworks such as Open Worldwide Application Security Project (OWASP) and SysAdmin, | Business Critical | |

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| | Audit, Network, and Security(SANS) during the design and development phases. | | |
| 129. | <p>Authentication and Authorization Controls - The platform must incorporate robust authentication mechanisms, including Multifactor Authentication (MFA), and enforce stringent authorization controls. This includes implementing measures to prevent unauthorized data access and distribution. Comprehensive user and admin access control management must be integrated, following the principle of least privilege. All access control mechanisms will be subject to review by PFRDA or its designated team.</p> | Business Critical | |
| 130. | <p>Application Security Features - During interface development, the Bidder must embed all essential security and control features as per OWASP and SANS standards to safeguard data confidentiality, integrity, and availability. The solution must include robust file-level validation controls for size, type, and content, with files being scanned for malicious content using antivirus software.</p> | Business Critical | |
| 131. | <p>Data Encryption and Storage Security - File storage locations must be secured, with strong cryptographic controls in place. Encryption keys must be stored in secure locations with restricted access. Strong encryption protocols must be applied to data both in transit and at rest. Key should be</p> | Business Critical | |

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| | managed using a key management system. | | |
| 132. | API Security - For any APIs consumed or exposed by the application, appropriate security controls should be implemented in accordance with industry best practices, such as those recommended by OWASP. | Business Critical | |
| 133. | PII Compliance and Data Privacy - For any Personally Identifiable Information (PII) collected by the application, compliance with applicable data privacy laws and regulations is mandatory. Explicit user consent must be obtained prior to capturing any PII data. No user data shall be shared with external or internal applications without the user's consent. All PII data, along with user consent records, must be stored securely and encrypted. | Business Critical | |

2.1.2 Secure development

| Sr. | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization ,3rd Party Integration, Not Available) |
|------|--|-------------------------------|--|
| 134. | Solution Compliance with SSDLC - The proposed solution must strictly adhere to the Secure System Development Lifecycle (SSDLC) process and best practices. The bidder is required to integrate the SSDLC security plan into the Project Plan, ensuring approval from PFRDA before implementation. | Business Critical | |

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| 135. | Secure Coding Practice - Bidder to adhere to the security plan as per the SSDLC activities and should incorporate it into the Project Plan before getting it approved from PFRDA. | Business Critical | |
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2.1.3 Secure Deployment

| Sr. | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization, 3rd Party Integration, Not Available) |
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| 136. | Source Code Access and Protection Controlled Access: The Bidder must enforce stringent processes and policies to ensure that only authorized personnel have access to the source code. | Business Critical | |
| 137. | Test Data Management: Test data must be carefully selected, protected, and controlled to prevent unauthorized access or data breaches. | Business Critical | |
| 138. | Version Control and Auditing: The source code must be maintained within a version-controlled environment, ensuring comprehensive logging and auditing of all activities performed on the code. | Business Critical | |
| 139. | Environment Separation and Data Security Environment Isolation: Pre-production and Production environments must be physically and logically separated to minimize the risk of unauthorized access and data leakage. | Business Critical | |

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| 140. | Data Security: The solution must prevent data leakage by implementing robust distributed programming frameworks. Data storage and logs must be secured, with auditing enabled to track all activities. | Business Critical | |
| 141. | Infrastructure Hardening: All underlying infrastructure components, including OS, Web servers, Application servers, and Database servers, must be hardened in each environment before being made operational. | Business Critical | |
| 142. | Logging and Security Integration Comprehensive Logging: Proper logging must be established to ensure that, in the event of an application being targeted or compromised, the organization can conduct forensic analysis as part of its incident response framework. | Business Critical | |
| 143. | Security System Integration: The Bidder must ensure the integration of the application with security systems such as Web Application Firewall (WAF), Intrusion Prevention System (IPS), and Security Information and Event Management (SIEM) systems. Additionally, the application must be integrated with Database Activity Monitoring (DAM) systems, with provisions for adding web logs to the SIEM for enhanced security monitoring. | Business Critical | |

2.1.4 Security assessment

| Sr. | Requirements | Business Critical / Desirable | Bidder's response (Out of the |
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| | | | Box/Available, Configurable , Customization ,3rd Party Integration ,Not Available) |
| 144. | Application Security Testing: The Bidder is required to conduct both Static Application Security Testing (SAST) and Dynamic Application Security Testing (DAST) where applicable. Detailed reports of these tests must be provided, and all identified vulnerabilities must be addressed. The Bidder must revalidate the closure of these vulnerabilities by conducting SAST and DAST again. | Business Critical | |
| 145. | Comprehensive Security Assessments: The Bidder must provide full support during Security Reviews, Vulnerability Assessment and Penetration Testing (VAPT), Risk Assessments, and any other related security evaluations of the entire platform as conducted by PFRDA. | Business Critical | |
| 146. | Industry Standards Compliance: To ensure a uniform understanding of any uncovered security issues, an independent organization specializing in Information Security will provide ratings based on industry standards. These ratings will be aligned with First's Common Vulnerability Scoring System (CVSS) and Mitre's Common Weakness Enumeration (CWE). | Business Critical | |

2.2 BCP – DR

| Sr. | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable , Customization ,3rd Party Integration |
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| | | | ,Not Available) |
| 147. | Disaster Recovery Plan Development: The selected Bidder is required to develop a comprehensive Disaster Recovery Plan (DRP) to restore the system in the event of a disaster or major incident. This plan must be designed to ensure system resilience and continuity. | Business Critical | |
| 148. | Testing of Disaster Recovery Plan: Prior to the system go-live, the Disaster Recovery Plan must be thoroughly tested to verify its readiness and effectiveness. The testing should confirm that all procedures and protocols can be executed as intended in a real disaster scenario. | Business Critical | |
| 149. | Secure Production Environment Transition: The Bidder must ensure that the transition of the build to the production environment is executed securely. Additionally, it is imperative that the production environment is fully prepared and operational for the system go-live. | Business Critical | |

2.3 Secure use of Open Source

| Sr. | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable , Customization ,3rd Party Integration ,Not Available) |
|------|--|-------------------------------|---|
| 150. | Comprehensive Support for Open-Source Technologies: The selected Bidder should provide full support in the implementation, maintenance, and ongoing management of open-source technologies utilized within the platform. This includes ensuring timely upgrades and patching to maintain system security and performance. | Business Critical | |
| 151. | Transparency and Security of Open-Source Libraries: The Bidder must | Business Critical | |

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| | provide a complete list of all open-source libraries incorporated into the platform. It is essential that none of these libraries contain any malicious code or scripts. To ensure security, all open-source libraries and code must undergo a thorough Static Application Security Testing (SAST) scan conducted by the Bidder. | | |
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2.4 Security Compliance to Policies and Process

| Sr. | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization, 3rd Party Integration, Not Available) |
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| 152. | Adherence to Access Control and Confidentiality Safeguards: The Bidder must strictly adhere to the access level agreement to ensure the confidentiality, integrity, and availability of information systems. | Business Critical | |
| 153. | Audit Rights and Security Risk Assessment: PFRDA reserves the right to audit the Bidder's personnel, processes, technology, and related aspects as part of the Vendor Security Risk Assessment process for this project. | Business Critical | |
| 154. | Legal and Regulatory Compliance: The solution must comply with the Indian Information Technology Act, 2000, including amendments from the Information Technology (Amendment) Act, 2008, and any applicable data privacy and protection legislation. Additionally, the system must fully comply with ISO 27001 security controls. | Business Critical | |

2.5 Security for support & maintenance

| Sr. | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization, 3rd Party Integration, Not Available) |
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| 155. | Adherence to PFRDA-Approved Processes: The Bidder must strictly follow all processes agreed upon by PFRDA, including Incident Management, Change Management, Release Management, and Patch Management. | Business Critical | |
| 156. | Security Testing for Changes: The Bidder is responsible for conducting Static Application Security Testing (SAST) and Dynamic Application Security Testing (DAST) for any change requests involving design or code modifications. Any identified security gaps must be resolved by the Bidder prior to go-live. | Business Critical | |
| 157. | Right to Conduct Additional Security Testing: PFRDA reserves the right to perform additional security testing on the source code and the system, either through PFRDA personnel or a third party. Any security gaps identified during this testing must be remediated by the Bidder at no additional cost to PFRDA. The software will not be deemed accepted until all security issues are resolved or a mutually agreed-upon remediation plan is established. | Business Critical | |
| 158. | Disclosure of Configuration Items: The Bidder is required to disclose all configuration items related to the application, including computers, devices, software and hardware contracts, licenses, third-party tools, and business services. | Business Critical | |

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| 159. | Resolution of Security Incidents: The Bidder will resolve security incidents in accordance with the agreed Service Level Agreements (SLAs). | Business Critical | |
| 160. | Access Management Compliance: All user and technical access will be granted based on the Role Matrix approved by PFRDA. Access will be reviewed at defined intervals and at control points, such as when team members leave the team or organization. | Business Critical | |
| 161. | Security Measures for Pre-Production Environments: Security controls must be enforced when moving production data into non-production environments, such as masking sensitive data during the cloning process. PFRDA will conduct audits to ensure these security measures are in place, and any identified gaps must be remediated by the Bidder. | Business Critical | |

2.6 Other Technical Requirements

| Sr. | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization, 3rd Party Integration, Not Available) |
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| 162. | Headless CMS Support: The system should offer support for a Headless or Decoupled CMS, designed as a back-end content management system that provides content via a RESTful API for display on any device. | Business Critical | |
| 163. | Audit Trail and Reporting: An audit trail of all data changes within the system must be maintained, allowing the identification of users responsible for modifications. The system should also provide the capability to generate reports based on these audit logs. | Business Critical | |

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| 164. | Runtime Code Swapping: The CMS must enable hot-swapping of application code at runtime without requiring a restart of the application. | Business Critical | |
| 165. | Data Replication and Recovery: The solution should allow for easy extraction of a full replica or copy of the site at any point in time for backup or recovery purposes. Additionally, an integrated caching layer should be included, offering multiple caching modes and controls, such as full-page, content pieces, or page section caching. | Business Critical | |
| 166. | Content Delivery Flexibility: The system must be capable of delivering content or pages in multiple formats, including XML and JSON. The platform should offer Content-as-a-Service (CaaS) capabilities, allowing for rapid generation of new services. | Business Critical | |
| 167. | Customization and Modularity: The solution should empower developers to quickly create multiple, highly customized, industry-standard applications from a single code base. These applications should be renderable on various devices (desktop, smartphone, tablets) without requiring additional code changes, file redeployment, or HTML publishing. The development tools should enable the application to be modular, with reusable components and the ability to apply different variants for generating multiple applications with varying presentation, business logic, and data. | Business Critical | |
| 168. | Third-Party Components: The Bidder is responsible for maintaining licenses and handling upgrades or patches for any third-party components used in the solution. The Bidder must disclose all third-party components used and ensure that these components are supported by valid subscriptions for patch updates and upgrades. | Business Critical | |

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| 169. | <p>Browser and OS Independence: The proposed system should be browser and operating system-independent, capable of running on environments like Windows, Linux, and Mac, and functioning across browsers such as Chrome, IE, Firefox, and Opera.</p> | Business Critical | |
| 170. | <p>Audit Trails and Access Controls: The system must provide audit trails, access controls, password controls, and report extraction controls. There should be provisions for generating snapshots or reports on active and deactivated users, as well as administrators and super administrators.</p> | Business Critical | |
| 171. | <p>Data Backup and Archival: An automated mechanism for backup and archival of the system database and application must be provided as defined by the Backup and Archival Policy of the bank. The automation should be highly configurable and must not impact system availability during backup or restore activities.</p> | Business Critical | |
| 172. | <p>Lightweight UI/UX: The UI and UX should be optimized to ensure fast loading of web pages and content, even on slow internet Connections. The response time for navigating through different web pages, sections, or tabs should be less than 3 seconds during peak utilization periods.</p> | Business Critical | |
| 173. | <p>File Upload and Architecture Compliance: The proposed solution should support single file uploads of up to 50 MB and adhere to the standard 3+ tier architecture (Web > Staging > App > DB). The solution should be centralized, with no components installed on end-user PCs except for the required thin client (plugins) or browser.</p> | Business Critical | |

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| 174. | Disaster Recovery Site Accessibility: The website and proposed solution should include replication at a remote Disaster Recovery (DR) site, ensuring accessibility from the DR site in the event of a disaster. | Business Critical | |
| 175. | Continuous Availability and Performance Management: The website solution must be available 24x7x365 for PFRDA. An automated alert mechanism should be implemented to send proactive alerts via email and SMS to designated PFRDA personnel when the website, PWA, is down or inaccessible. For performance management, enterprise solutions like Gecko Board with a full-scale Application Performance Management (APM) module should be provided for PFRDA's access and monitoring of SLAs, with all KPIs tracked. | Business Critical | |

2.7 Other general security requirements

| Sr. | Requirements | Business Critical / Desirable | Bidder's response (Out of the Box/Available, Configurable, Customization, 3rd Party Integration, Not Available) |
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| 176. | Security Features & Audit Trails: The solution must incorporate robust security features and maintain comprehensive audit logs to ensure a historical record of all activities performed by authorized users. Best-in-class industry safeguards should be implemented to prevent misuse of information systems and to ensure the confidentiality, integrity, and availability of these systems. | Business Critical | |
| 177. | Security Plan Compliance & Risk Mitigation : A security plan that complies with industry-accepted | Business Critical | |

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|------|--|-------------------|--|
| | <p>security standards must be developed, integrated into the Project Plan, and approved by PFRDA. Should PFRDA conduct a security risk assessment of the proposed solution, any identified risks must be remediated by the bidder at their own expense.</p> | | |
| 178. | <p>Secure Development & Code Integrity: The proposed solution must adhere to secure software coding standards. Code development should follow secure coding practices and undergo peer review (or automated tool review) to ensure compliance. Access to source code should be restricted, authenticated, and logged, ensuring the integrity and confidentiality of the code. If development occurs on the bidder's premises, additional measures to protect the source code must be implemented.</p> | Business Critical | |
| 179. | <p>Transparency & Testing of Components: The bidder must disclose the origin of all software and hardware components used in the product, including open-source and third-party licensed components. PFRDA reserves the right to conduct additional security testing of the system. Any security gaps identified during this testing must be addressed by the bidder at their own cost. The solution will only be accepted once all security issues are resolved or a mutually agreed remediation roadmap is established.</p> | Business Critical | |
| 180. | <p>Disaster Recovery & Secure Deployment : The selected bidder is required to develop a Disaster Recovery Plan, including Active-Passive DR setup readiness, to ensure system restoration in the event of a disaster or major incident. The promotion of the build to the</p> | Business Critical | |

| | | | |
|------|---|-------------------|--|
| | production environment must be conducted securely, ensuring the production environment is ready for system go-live. The solution must include proper encryption and secure data transmission throughout the application, with two-factor authentication provided for application login. | | |
| 181. | <p>Comprehensive Security in Interfaces & Encryption Standards:</p> <p>During interface development, the bidder must incorporate all necessary security and control features across the application, OS, database, and network to maintain data integrity and confidentiality. The solution should support all types of encryptions, hashing, and masking, utilizing industry-standard, government-grade encryption technologies, including advanced algorithms such as AES, 3-DES, and RSA.</p> | Business Critical | |

SCCHEDULE III: Indicative FRS for PFRDA-Connect

1 Proposed / indicative Website Header

| Sl.No | Accessibility Features | Functionalities |
|-------|------------------------|--|
| 1 | Webpage Mode | 1. User should be able to select between two modes of the website: <ul style="list-style-type: none"> ○ Dark Theme ○ Light Theme 2. The light theme would be default and users should be able to switch between them using an option or toggle. |
| 2 | Magnifier | Users should be able to select the percentage of magnification as per their requirement. Options available: 50% , 75% , 90%, 100%, 125%, 150%, 200%. The default should be at 100% fit/zoom. |
| 3 | Language Selector | 1. The system should detect the user's location and suggest a language option. Default language: English. 2. Users should be able to select a language from a dropdown. Initially, only English and Hindi will be available, but multi-lingual support should be incorporated from the start. |
| 4 | GIGW Guidelines | User Interface and other functionalities should adhere to GUIDELINES FOR INDIAN GOVERNMENT WEBSITES (GIGW 3.0), including content view support for visually disabled persons. The website should be responsive. |
| 5 | Global Search Bar | Users should be able to search the website by entering keywords, and search results should be displayed accordingly. |
| 6 | Others | All modules on existing websites should be covered. Reference: https://pfrda.org.in . |

2 Details of the proposed Menu Items

NOTE:

- Menu items are only indicative.
- Category, sub-category, sub-sub-category navigation on the header and footer (should have PFRDA GSTIN) should be provided.
- System should have functionality to create menu and submenu items up to level 4, provision to be given to Admin for labelling of the same

| Menu | Submenu |
|------|--|
| Home | This will enable users to navigate back to the home page from any section of the website. This menu will have no sub-menu. |

| Menu | Submenu | | |
|---|---|---|--|
| About Us | 1. This section provides a submenu to help users understand more about PFRDA. The submenu includes: | | |
| | <table border="1"> <tr> <td data-bbox="480 421 719 544">Authority</td> <td data-bbox="719 421 1396 544">Redirects users to the Authority section where they can read about details and navigate back by clicking the back browser button or the home button.</td> </tr> </table> | Authority | Redirects users to the Authority section where they can read about details and navigate back by clicking the back browser button or the home button. |
| | Authority | Redirects users to the Authority section where they can read about details and navigate back by clicking the back browser button or the home button. | |
| | <table border="1"> <tr> <td data-bbox="480 544 719 622">Vision Statement</td> <td data-bbox="719 544 1396 622">This would share the vision statement details for PFRDA</td> </tr> </table> | Vision Statement | This would share the vision statement details for PFRDA |
| | Vision Statement | This would share the vision statement details for PFRDA | |
| <table border="1"> <tr> <td data-bbox="480 622 719 701">Organizational Structure</td> <td data-bbox="719 622 1396 701">This would show the hierarchy of the organization</td> </tr> </table> | Organizational Structure | This would show the hierarchy of the organization | |
| Organizational Structure | This would show the hierarchy of the organization | | |
| 2. Users should be able to navigate back to the home page by using the Home button or the back navigation page | | | |
| Regulatory Framework | This section shall provide the users with certain sub-menu where they can access the sectors of regulatory framework of PFRDA. | | |
| | <table border="1"> <tr> <td data-bbox="480 913 699 992">Acts</td> <td data-bbox="699 913 1396 992">this section to showcase all Acts to related the authority</td> </tr> </table> | Acts | this section to showcase all Acts to related the authority |
| | Acts | this section to showcase all Acts to related the authority | |
| | <table border="1"> <tr> <td data-bbox="480 992 699 1037">Rules</td> <td data-bbox="699 992 1396 1037">This section shows all the rules related to PFRDA</td> </tr> </table> | Rules | This section shows all the rules related to PFRDA |
| | Rules | This section shows all the rules related to PFRDA | |
| | <table border="1"> <tr> <td data-bbox="480 1037 699 1126">Regulations</td> <td data-bbox="699 1037 1396 1126">This section shows all the regulations framed by the organization</td> </tr> </table> | Regulations | This section shows all the regulations framed by the organization |
| | Regulations | This section shows all the regulations framed by the organization | |
| | <table border="1"> <tr> <td data-bbox="480 1126 699 1238">Circular Notification RTI</td> <td data-bbox="699 1126 1396 1238"></td> </tr> </table> | Circular Notification RTI | |
| Circular Notification RTI | | | |
| <table border="1"> <tr> <td data-bbox="480 1238 699 1328">Orders and Notices</td> <td data-bbox="699 1238 1396 1328"></td> </tr> </table> | Orders and Notices | | |
| Orders and Notices | | | |
| <table border="1"> <tr> <td data-bbox="480 1328 699 1529">Compendium of PFRDA Act, Rules and Regulations</td> <td data-bbox="699 1328 1396 1529"></td> </tr> </table> | Compendium of PFRDA Act, Rules and Regulations | | |
| Compendium of PFRDA Act, Rules and Regulations | | | |
| <table border="1"> <tr> <td data-bbox="480 1529 699 1854">Exposure Draft</td> <td data-bbox="699 1529 1396 1854">In this section, stakeholders may will be provided with options to provide their details, select appropriate drafts which are open for public comments (Ref SEBI website: https://www.sebi.gov.in/sebiweb/publiccommentv2/PublicCommentAction.do?doPublicComments=yes)</td> </tr> </table> | Exposure Draft | In this section, stakeholders may will be provided with options to provide their details, select appropriate drafts which are open for public comments (Ref SEBI website: https://www.sebi.gov.in/sebiweb/publiccommentv2/PublicCommentAction.do?doPublicComments=yes) | |
| Exposure Draft | In this section, stakeholders may will be provided with options to provide their details, select appropriate drafts which are open for public comments (Ref SEBI website: https://www.sebi.gov.in/sebiweb/publiccommentv2/PublicCommentAction.do?doPublicComments=yes) | | |
| Users should be able to navigate back to the home page by using the Home button or the back navigation page | | | |

| Menu | Submenu | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------------|--|---|--|-------------------|---|-------------------------|--|-----------------|--|--------------|--|-----------------|---|----------|--|-------|--|---------------------|--|-----------------|--|---------------------|--|---------------|--|--------------------------|--|
| National Pension System | This section shows the details about the NPS section | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | <table border="1"> <tr> <td>About NPS</td> <td>This shall host three more options inside them namely: Understanding NPS, NPS Architecture and NPS Benefits of NPS</td> </tr> <tr> <td>All Citizen Model</td> <td>This section shall have further options inside such as Eligibility, Benefits to Subscribers, Enrolments, Types of Accounts, Contribution, Investment Choices, Withdraw/Exit, Charges and FAQs</td> </tr> <tr> <td>Government Sector Model</td> <td>This shall have details of CAB, SAB, CG, SG and FAQs</td> </tr> <tr> <td>Corporate Model</td> <td>This section shall have details of Eligibility, Benefits, Account Options, Contribution, Investment choices, Charges, NPS Corporate Sector (PDF), FAQs</td> </tr> <tr> <td>NPS Vatsalya</td> <td>This would have details of the NPS Vatsalya scheme</td> </tr> <tr> <td>NPS Swavalamban</td> <td>This would have sub- options of withdrawal/exit and Forms</td> </tr> <tr> <td>Join NPS</td> <td>This section shall allow users to join NPS</td> </tr> <tr> <td>e-NPS</td> <td></td> </tr> <tr> <td>Grievance Redressal</td> <td></td> </tr> <tr> <td>Training on NPS</td> <td></td> </tr> <tr> <td>Financial Education</td> <td></td> </tr> <tr> <td>Exit from NPS</td> <td></td> </tr> <tr> <td>Annuity Service Provider</td> <td></td> </tr> </table> | About NPS | This shall host three more options inside them namely: Understanding NPS, NPS Architecture and NPS Benefits of NPS | All Citizen Model | This section shall have further options inside such as Eligibility, Benefits to Subscribers, Enrolments, Types of Accounts, Contribution, Investment Choices, Withdraw/Exit, Charges and FAQs | Government Sector Model | This shall have details of CAB, SAB, CG, SG and FAQs | Corporate Model | This section shall have details of Eligibility, Benefits, Account Options, Contribution, Investment choices, Charges, NPS Corporate Sector (PDF), FAQs | NPS Vatsalya | This would have details of the NPS Vatsalya scheme | NPS Swavalamban | This would have sub- options of withdrawal/exit and Forms | Join NPS | This section shall allow users to join NPS | e-NPS | | Grievance Redressal | | Training on NPS | | Financial Education | | Exit from NPS | | Annuity Service Provider | |
| | About NPS | This shall host three more options inside them namely: Understanding NPS, NPS Architecture and NPS Benefits of NPS | | | | | | | | | | | | | | | | | | | | | | | | | |
| | All Citizen Model | This section shall have further options inside such as Eligibility, Benefits to Subscribers, Enrolments, Types of Accounts, Contribution, Investment Choices, Withdraw/Exit, Charges and FAQs | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Government Sector Model | This shall have details of CAB, SAB, CG, SG and FAQs | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Corporate Model | This section shall have details of Eligibility, Benefits, Account Options, Contribution, Investment choices, Charges, NPS Corporate Sector (PDF), FAQs | | | | | | | | | | | | | | | | | | | | | | | | | |
| | NPS Vatsalya | This would have details of the NPS Vatsalya scheme | | | | | | | | | | | | | | | | | | | | | | | | | |
| | NPS Swavalamban | This would have sub- options of withdrawal/exit and Forms | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Join NPS | This section shall allow users to join NPS | | | | | | | | | | | | | | | | | | | | | | | | | |
| | e-NPS | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Grievance Redressal | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Training on NPS | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Financial Education | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Exit from NPS | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Annuity Service Provider | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Users should be able to navigate back to the home page by using the Home button or the back-navigation page | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Unified Pension Scheme | Sub-menu will be finalized discussed during implementation | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Atal Pension Yojana | This section of the menu should take to detail page towards APY. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Intermediaries | This section consists of details about the Intermediaries. Brief about Intermediaries may be given, link to the respective Intermediary website may be given for further details. | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Menu | Submenu | | | | | | | | | | | | | | | | |
|-------------------------------|--|-----------|---|-------------------------------|---|---------------|--|--------------|--|-----------|---|-------------------|--|---------------------|--|-------------|---|
| | <p>This section shall consist of the following sub-menu. Each sub-menu here shall have different options:</p> <table border="1" data-bbox="480 436 1398 1883"> <tr> <td data-bbox="480 436 691 517">NPS Trust</td> <td data-bbox="691 436 1398 517">This section does have three options “About us”, “Board” and “Function”</td> </tr> <tr> <td data-bbox="480 517 691 685">Central Record-keeping agency</td> <td data-bbox="691 517 1398 685">This would have options of “About CRA”, “Function of CRA”, “Link to CRAs”, “Regulation/Selection Process of CRA”, “SOP”, “Regulations – CRA Related”, “CRA Guidelines”</td> </tr> <tr> <td data-bbox="480 685 691 936">Pension Funds</td> <td data-bbox="691 685 1398 936">This section shows the options “About PF”, “Roles and Responsibilities”, “Functions”, “Regulations”, “Guidelines”, “Circulars”, “List of PFs”, “PF Changes”, “Schemes”, “Investment Choices”, “Public Disclosures”, “Return to NPS Scheme”</td> </tr> <tr> <td data-bbox="480 936 691 1059">Trustee Bank</td> <td data-bbox="691 936 1398 1059">This would show options of “About”, “Function”, “Selection/Registration process”, “List of Trustee Banks”</td> </tr> <tr> <td data-bbox="480 1059 691 1227">Custodian</td> <td data-bbox="691 1059 1398 1227">This would show up options as “About Custodian”, “Roles and Responsibilities”, “Functions”, “Regulators”, “Circulars”, “Circulars Guidelines” “List of Custodians”</td> </tr> <tr> <td data-bbox="480 1227 691 1478">Point of Presence</td> <td data-bbox="691 1227 1398 1478">This would show up as “About”, “Functions”, “Circulars”, “List of POPs”, “POP Guidelines”, “Registration Process”, “Regulation” Under “Compliance” list of all the compliance requirements may be displayed for information / for ease of reference for PoPs or prospective PoP</td> </tr> <tr> <td data-bbox="480 1478 691 1686">Retirement Advisers</td> <td data-bbox="691 1478 1398 1686">The sub-sections would be the same as the current website options. Under “Compliance”, list of all the compliance requirements for information / for ease of reference fo RAs</td> </tr> <tr> <td data-bbox="480 1686 691 1883">Aggregators</td> <td data-bbox="691 1686 1398 1883">The sub-sections would be the same as the current website options Under “Compliance” list of all the compliance requirements for information / for ease of reference fo Aggregators</td> </tr> </table> | NPS Trust | This section does have three options “About us”, “Board” and “Function” | Central Record-keeping agency | This would have options of “About CRA”, “Function of CRA”, “Link to CRAs”, “Regulation/Selection Process of CRA”, “SOP”, “Regulations – CRA Related”, “CRA Guidelines” | Pension Funds | This section shows the options “About PF”, “Roles and Responsibilities”, “Functions”, “Regulations”, “Guidelines”, “Circulars”, “List of PFs”, “PF Changes”, “Schemes”, “Investment Choices”, “Public Disclosures”, “Return to NPS Scheme” | Trustee Bank | This would show options of “About”, “Function”, “Selection/Registration process”, “List of Trustee Banks” | Custodian | This would show up options as “About Custodian”, “Roles and Responsibilities”, “Functions”, “Regulators”, “Circulars”, “Circulars Guidelines” “List of Custodians” | Point of Presence | This would show up as “About”, “Functions”, “Circulars”, “List of POPs”, “POP Guidelines”, “Registration Process”, “Regulation” Under “Compliance” list of all the compliance requirements may be displayed for information / for ease of reference for PoPs or prospective PoP | Retirement Advisers | The sub-sections would be the same as the current website options. Under “Compliance” , list of all the compliance requirements for information / for ease of reference fo RAs | Aggregators | The sub-sections would be the same as the current website options Under “Compliance” list of all the compliance requirements for information / for ease of reference fo Aggregators |
| NPS Trust | This section does have three options “About us”, “Board” and “Function” | | | | | | | | | | | | | | | | |
| Central Record-keeping agency | This would have options of “About CRA”, “Function of CRA”, “Link to CRAs”, “Regulation/Selection Process of CRA”, “SOP”, “Regulations – CRA Related”, “CRA Guidelines” | | | | | | | | | | | | | | | | |
| Pension Funds | This section shows the options “About PF”, “Roles and Responsibilities”, “Functions”, “Regulations”, “Guidelines”, “Circulars”, “List of PFs”, “PF Changes”, “Schemes”, “Investment Choices”, “Public Disclosures”, “Return to NPS Scheme” | | | | | | | | | | | | | | | | |
| Trustee Bank | This would show options of “About”, “Function”, “Selection/Registration process”, “List of Trustee Banks” | | | | | | | | | | | | | | | | |
| Custodian | This would show up options as “About Custodian”, “Roles and Responsibilities”, “Functions”, “Regulators”, “Circulars”, “Circulars Guidelines” “List of Custodians” | | | | | | | | | | | | | | | | |
| Point of Presence | This would show up as “About”, “Functions”, “Circulars”, “List of POPs”, “POP Guidelines”, “Registration Process”, “Regulation” Under “Compliance” list of all the compliance requirements may be displayed for information / for ease of reference for PoPs or prospective PoP | | | | | | | | | | | | | | | | |
| Retirement Advisers | The sub-sections would be the same as the current website options. Under “Compliance” , list of all the compliance requirements for information / for ease of reference fo RAs | | | | | | | | | | | | | | | | |
| Aggregators | The sub-sections would be the same as the current website options Under “Compliance” list of all the compliance requirements for information / for ease of reference fo Aggregators | | | | | | | | | | | | | | | | |

| Menu | Submenu |
|-------------------------------|---|
| Media Corner | <p>This section would be an archive of PRs, Publicity material, Video and Images.</p> <p>This section would consist of as drop downs: PRs, Publicity material, Video and Images.</p> |
| Financial Literacy Training | <p>This section is designed to enhance financial literacy through various features and functionalities, including:</p> <ol style="list-style-type: none"> 1. Access to Financial Literacy Training: Subscribers can achieve financial literacy by accessing training materials. 2. Free Material Access: Subscribers and users can access freely available financial literacy resources. <p>Breaking down each of these goals in terms of functionality: A. User Persona:</p> <ol style="list-style-type: none"> 1. Upcoming Trainings: <ul style="list-style-type: none"> • A comprehensive list of PFRDA trainings (excluding dates) will be available. Clicking this tab will show different training categories (e.g., NPS, APY, Corporate training) with dates, times, links, and passcodes (if applicable). • Initiatives Section: A dedicated section listing all PFRDA initiatives for Financial Literacy, including: <ul style="list-style-type: none"> ○ Retirement Planner Scheme ○ Videos on Retirement Planning ○ Awareness Programs (ALP, SEEP) ○ Training on NPS/APY ○ Links to Pension Sanchay and NCFE • Detailed information for each initiative will be provided. • Publicly Accessible Materials: Users can download financial literacy content listed and uploaded by PFRDA admins. |
| Research | This section would be having: Working Papers and Pension Bulletins |
| Quick Links: | <p>This section would consist of:</p> <ul style="list-style-type: none"> • Resources: This section would have Forms and Reports and Downloads • Any other shortcuts provided by the PFRDA team • Add a dynamic web form builder |
| Grievance Redressal mechanism | <ol style="list-style-type: none"> 1. In this section the users will be guided to a page which would be informative about the process to lodge grievance. Also this page will have existing links to the respective POP. |

Dynamic Ticker and Notice

| Area | Functionalities |
|----------------------|---|
| Dynamic Notice Board | <p>Users should be able view notices, promotional materials and other information as posted by PFRDA on this dynamic notice board.</p> <p>This section should include:</p> <ul style="list-style-type: none"> • Dynamic Notices with redirection links as applicable: Users should be able to view notices which flicker horizontally. • Navigation Indexes: Users should be able to use the right or left direction button toggle between the notices. |

3 News and Events

| Area | Functionalities |
|-----------------|---|
| News and Events | <p>1. Display of News and Announcements</p> <p>Users will see a dynamic section on the right side of the webpage displaying news and event announcements made by PFRDA. This section will include:</p> <ul style="list-style-type: none"> • Date: The publication date of the announcement. • Tag: Categories such as Recruitment, Announcements, News, and Others. • Size: The size of the announcement content. <p>2. Interaction with News Feed</p> <p>The scrolling of news items will pause when the user hovers their cursor over the news section.</p> <p>3. Detailed View</p> <p>Clicking the "View More" button will redirect users to a dedicated section where all announcements are displayed, categorized by tags such as:</p> <ul style="list-style-type: none"> • Recruitment • Announcements • News • Others |

| | |
|--|---|
| | <p>4. Navigation and Search</p> <ul style="list-style-type: none"> • Pagination: Users can navigate through multiple pages if there are more announcements than fit on a single page. • Search Functionality: Users can search for specific announcements by name. • Sort Options: Announcements can be sorted by the date published. <p>5. Archival Management (Admin Functionality)</p> <ul style="list-style-type: none"> • Archiving: Admins have the ability to archive content. <ul style="list-style-type: none"> ○ Archive Button: Clicking this will redirect the user to a page where all archived content is displayed, categorized by tags such as: <ul style="list-style-type: none"> ▪ Recruitment ▪ Announcements ▪ News ▪ Others ○ Pagination and Navigation: Archived content will also support pagination and can be navigated across multiple pages. |
|--|---|

4 Website Footer - Options

| Area | Functionalities |
|----------------------|--|
| Contact Us | <p>This section once clicked shall redirect to a page containing the following:</p> <ul style="list-style-type: none"> • Contact PFRDA • NPS Information Desk • APY Information Desk |
| Accessibility Option | <p>This section once clicked will redirect to the accessibility of the website like:</p> <ul style="list-style-type: none"> • Changing text size • Changing Contrast • Changing text spacing <p>Users will be able to save changes by clicking on the "Apply" button.</p> |
| RTI | <p>This section would redirect to a section containing details of RTI and the link to access the RTI website</p> |
| Vigilance | <p>This section would redirect to a section containing details of Vigilance and the link to access the Vigilance website</p> |

| Area | Functionalities |
|----------------------|--|
| List of Holidays | This section would show the holiday calendar for the current year by default Users can view the past calendar details by selecting the year from the drop down |
| Tenders | This section lists down the tenders that are being floated by the PFRDA. Users and external bidders can view and apply for them by clicking on the view details which would have the apply at the end of the section. In case it would require an offline bid users can download the tender notice or forms |
| Careers | This section would comprise of the advertisement for the positions declared and candidates can view and apply based on the nature of application (offline or online) |
| Related Links | This section comprises of the following: <ul style="list-style-type: none"> • Reserve Bank of India (RBI) • Securities and Exchange Board of India (SEBI) • Insurance Regulatory and Development Authority (IRDA) • National Housing Bank • Invest India Economic Foundation (IIEF) • National Securities Depository Limited (NSDL) • Stock Holding Corporation of India Limited • National Stock Exchange (NSE) • Mumbai Stock Exchange (BSE) • Central Depository Services (India) Limited (CDSL) • International Organisation of Pension Supervisors (IOPS) • Ministry of Finance (Government of India) • National Centre for Financial Education • Fixed Income Money Market and Derivatives Association of India (FIMMDA) • Investment Information and Credit Rating Agency (ICRA) |
| Disclaimer | This section shows the disclaimers laid down by PFRDA |
| Website Policies | This section lists down the policies mentioned by PFRDA regarding their website |
| Terms and Conditions | This section lists down the terms and conditions of the PFRDA |
| Feedback | This section allows users to share feedback on the website design as well as the overall user experience |
| Sitemap | This shows the website infrastructure and sitemap |
| FAQs | |

5 APY Section on PFRDA Website

| Area | Functionalities |
|--------------------|--|
| Home Page Elements | <ul style="list-style-type: none"> • Logo • May also have the National Emblem • Tagline • Other branding elements as described by the APY team |
| Body Section | <ul style="list-style-type: none"> • Banners displaying benefits of enrolling into APY • Banners will keep scrolling |
| What's New Section | <p>The "what's new section" would be scrolling" a right-hand side small box wherein any upcoming events, etc can be regularly updated.</p> <p>This page can be opened on a new page if we click on an icon "view full page" containing details of:</p> <ul style="list-style-type: none"> • Upcoming Events • New Press Release • Latest news <p>The webpage should support the following:</p> <ul style="list-style-type: none"> • The ability to sort items in the "What's New" section by date, with the most recent items appearing first. • The ability to filter items in the "What's New" section by category or type, such as updates to products or services, upcoming events, or other important information. • The ability to include images and multimedia content in the "What's New" section, to make it more visually appealing and engaging. • The ability for website administrators to add, edit, and delete items in the "What's New" section, with appropriate access controls to ensure that only authorized users can make changes. • The ability for website visitors to subscribe to receive notifications when new items are added to the "What's New" section, such as by email or through an RSS feed. • The ability to track the number of views and clicks on the items in the "What's New" section, to help website administrators measure the effectiveness of the section. • The ability to make the "What's New" section accessible and usable by people with disabilities, using appropriate web accessibility standards and guidelines |

| | |
|---|--|
| | |
| About Us | <p>This would be a tab inside the APY. This should show up accordion options when hovering over it. This should list down:</p> <ul style="list-style-type: none"> • About PFRDA • About APY • Objectives • Who's who: this would list down the names and designations of major office bearers along with the Name, Email, Designation |
| APY Scheme Details | <p>This section should when clicked should redirect to a page containing the details:</p> <ul style="list-style-type: none"> • Scheme Description • Scheme Objective • Gazette Notification • Eligibility • Benefits |
| APY Forms | <ul style="list-style-type: none"> • Forms for APY SPs • Forms for Existing subscribers • Forms for new registration |
| Clear Segregation for sections for various stakeholders expected on the website | <p>This section should have separate tabs namely:</p> <ul style="list-style-type: none"> • Potential Subscribers • Existing Subscribers • Service Providers <p>This ensures there is a clear bifurcation between the website sections for subscribers and the service providers. These sections shall have information relevant to each stakeholder, including separate FAQs, information, Circulars, etc</p> |
| Stakeholders communication | <ul style="list-style-type: none"> • Circulars • Guidelines • FAQs • Press Releases • APY eDigest and e-Newsletter • Link for Podcasts • Link for APY User services- QR codes |
| APY Publicity Material and Media related information | <p>This section would have the following details:</p> <ol style="list-style-type: none"> 1. Publicity Materials and Social Media. <ul style="list-style-type: none"> • Advertisements Documents in PDF forms • Posters for Campaigns and Awareness |

| | |
|-------------------------|---|
| | <ul style="list-style-type: none"> • Social Media Links • APY Subscriber information brochure for existing subscriber • APY Subscriber information brochure for prospective subscribes <p>2. APY e-Digest Newsletter (user can subscribe to these newsletters by entering their email address and sharing consent for subscription)</p> <ul style="list-style-type: none"> • Photo Gallery • Video Gallery |
| APY Incentive Structure | This section should highlight APY's incentive structure |
| APY Training | <p>This section should have following drop-downs:</p> <ul style="list-style-type: none"> • Training Calendar • Training Centre • Admin module to upload training material of all media types. |
| Grievance Mechanism | Link to Grievance Mechanism, integrated with PFRDA Grievance System |
| Important/Quick Links | <p>This section allows users to do the following dropdowns:</p> <p>a. eAPY link</p> <ul style="list-style-type: none"> • Online APY Account Opening • APY SP Locator: <ul style="list-style-type: none"> ○ Allows users to locate a center for APY. Clicking the link will redirect users to a section containing: <p>b. Map of India</p> <ul style="list-style-type: none"> • Area of Interest: <ul style="list-style-type: none"> ○ Dropdown options to select: <ul style="list-style-type: none"> ▪ State ▪ District ▪ Nearby SP ▪ Village-wise SP <p>Searches using these combinations will display centers by highlighting the corresponding part of the map.</p> <p>c. Social Media Pages:</p> <ul style="list-style-type: none"> • Links for "Did You Know," web banners, and advertisements. <p>d. Dashboard Link:</p> <ul style="list-style-type: none"> • Provides access to the CRA website for reports for: <ul style="list-style-type: none"> ○ APY SPs ○ SLBCs ○ LDMs |

| | |
|------------|--|
| Contact us | <ul style="list-style-type: none"> • Email ids • Call centre numbers • Office address |
|------------|--|

6 Details of the Footer Items

| Area | Functionalities |
|--------------------|---|
| Home Page Elements | <p>This section would be a fixed non-dynamic section at the end of the webpage. This would include:</p> <ul style="list-style-type: none"> • Accessibility Statement • Terms and Conditions • FAQs • Contact us • Disclaimer • Glossary • Site Map |

7 Content Management System

| Functional Area | Overview | Admin Ability |
|--|---|---|
| Create, Edit, Delete Pages and other content | <p>Ability of authorized personnel to manage the website's content, ensuring it is accurate, up-to-date, and relevant. This includes:</p> <ul style="list-style-type: none"> • A user-friendly interface for creating and editing pages and content (e.g., WYSIWYG editor or markdown editor). • The ability to preview changes before publishing them. • The ability to schedule content publishing, allowing for review and approval before it is made live. • The ability to organize content hierarchically (e.g., parent-child page relationships). • The ability to assign different access levels to users to control who can create, edit, and delete content. | <ul style="list-style-type: none"> • Ability to approve content before publishing • Ability to remove/edit or add content if directed by senior management and Government of India • Views logs or content edited, added and deleted |

| | | |
|--|---|---|
| | <ul style="list-style-type: none"> • The ability to track revisions and changes, allowing rollback or restoration of previous versions. • The ability to handle multimedia and document upload/management (e.g., images, videos, documents). • The ability to apply government standards (e.g., accessibility, security) to content. | |
| Organize and categorize content on the website, such as by department or topic | <p>Ability of users to easily find and access the information they need. This includes:</p> <ul style="list-style-type: none"> • The ability to create and manage categories and subcategories for content, such as by department or topic • The ability to assign multiple categories to a single piece of content • The ability to create and manage tags for content, which can be used to further organize and filter content • The ability to search and filter content by category, tag, or other metadata • The ability to create and manage custom taxonomies for content, such as for geographic regions or other specific information • The ability to automate the categorization of content, such as through machine learning algorithms or natural language processing • The ability to create and manage custom fields for content, such as for adding custom metadata • The ability to display the | <ul style="list-style-type: none"> • Ability to view all content across website and view categorization • Flag any wrong Categorization • Allow new language introduction to these content |

| | | |
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| | <p>categorized content in a hierarchical structure, such as parent-child relationships between pages</p> <ul style="list-style-type: none"> • The ability to handle the multilingual content and localization, allowing users to find the content in their preferred language. | |
| <p>Publish and schedule content to go live on the website at a specific date and time</p> | <p>Ability of users for effective management and timing of content releases. This includes:</p> <ul style="list-style-type: none"> • The ability to schedule the publishing of new pages or content, allowing for review and approval before they are made live • The ability to schedule the removal of content, such as for expiration or archiving • The ability to set up automatic publishing or removal of content based on predefined rules or triggers • The ability to view a calendar or schedule of upcoming content publishing events • The ability to view the history of published and scheduled content • The ability to automate the publishing process, such as through an API or integration with other systems • The ability to set up workflows for content review and approval, allowing multiple users to review and approve content before it is published • The ability to handle the content expiration and archiving, allowing the user to easily find the expired or archived content if needed. | <ul style="list-style-type: none"> • View and approve details of content published • View logs of publication |

| | | |
|---|--|--|
| <p>Handle multimedia and document upload and management</p> | <p>Allowing for the inclusion of various media types in website content. This includes:</p> <ul style="list-style-type: none"> • Upload, store, and manage multimedia (e.g., documents, images, videos, audio). • Upload, store, and manage documents (e.g., PDFs, Word, Excel files). • Preview/play multimedia files within the CMS. • Preview documents within the CMS. • Organize and categorize multimedia/document files (e.g., by department/topic). • Search and filter multimedia/document files by category, tag, or metadata. • Set up/manage access controls for multimedia/document files. • Automate multimedia/document handling (e.g., via PI or system integration). • Handle version control for multimedia/documents rollback to previous versions). | <ul style="list-style-type: none"> • View and enable formats supported for the upload • View logs of uploads done and check for activity by users |
| <p>Support multilingual content and localization</p> | <ul style="list-style-type: none"> • Ability to support website content for various languages. • Detection of languages based on the regions or browser. Or default to English | <ul style="list-style-type: none"> • View all languages supported by the portal • Approve new language and remove it if required. • Website translation is an important functionality. • While the content will be written first in English, the system should be able to translate the same in Hindi through a simple translate API. And the editor should be able to edit, refine publish it live. |

| | | |
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| Uniformity in content | | <ul style="list-style-type: none"> • Use an open source /proprietary external plugin for this feature. • The authors should be able to view the various indicators of their writing style, such as tone, professionalism, warmth, etc. • They should be able to match the same to the recommended level for the website to ensure there is uniformity in content when multiple users write and edit. This is an optional feature. • This could be replaced by having a role, “Master editor”, who will review all content before it gets published. |
|-----------------------|--|---|

8 Content Types

The following are examples of relevant content types; however, this list is not exhaustive:

- Circulars
- Guidelines
- Notices
- Orders
- Regulations
- Rules
- Profiles (e.g., key personnel, employees, regulated entities)
- Data Reports and Business Figures
- Exposure Drafts and Journals
- Public Disclosures
- Tenders
- Fact Sheets and Infographics
- Publications
- Press Releases
- Events and Speeches

9 Expected Traffic

The traffic for the websites should be measured in respect with these following success metrics:

- Number of visits / months: 10 to 12 Lakh
- Unique visitors / month: 10 Lakh
- Web Pages Browsed / month: 50 Lakh

10 Design Guidelines

- 1 **Usability:** The website must be intuitive and user-friendly, ensuring ease of navigation and understanding for all users, including those with disabilities.
- 2 **Accessibility:** The website should comply with established accessibility standards, such as **GIGW 3.0**, **WCAG 2.0**, to ensure that it is usable by individuals with disabilities. This includes providing accessible navigation and content for screen readers and other assistive technologies.
- 3 **Branding:** The website must strictly adhere to government branding guidelines, utilizing consistent design elements, colors, fonts, and logos to maintain a unified and professional appearance.
- 4 **Content Organization:** The website content should be structured clearly and logically, with well-organized sections, easily accessible information, and clear, concise headings to facilitate smooth navigation.
- 5 **Search Functionality:** A robust search function should be incorporated into the website, allowing users to quickly find the information they are seeking without unnecessary browsing.
- 6 **Responsive Design:** The website should feature a responsive design, optimized for a variety of devices and screen sizes (desktop, mobile, tablet), ensuring a seamless user experience across platforms.
- 7 **Security:** The website must be designed with security in mind, implementing measures to protect users' personal information and data from potential threats, ensuring compliance with security standards and guidelines.
- 8 **Performance:** The website should be optimized for performance, including fast load times and efficient resource usage, to provide a smooth and swift user experience, especially in high-traffic scenarios.
- 9 **Analytics:** The website should include tools for tracking and analyzing user behavior (such as page views, navigation patterns, and time spent on pages) to continuously improve the user experience and functionality.
- 10 **User Feedback:** A mechanism for collecting user feedback and suggestions for website improvements should be integrated, enabling continuous improvement based on real-time user insights.

11 Editorial Workflow

Creation and Approval Flow

- **Content Drafting:**
Editors or authors should have the capability to create and draft content within the system.
- **Approval Process:**
Senior editors or administrators must review and give final approval before the content is published.
- **Publishing:**
Upon approval, content should be published on the website with proper workflows.
- **Task Assignment:**
The system should allow administrators to assign tasks to content creators with clear deadlines and responsibilities.
- **Status Tracking & Version Control:**
Track the status of content throughout the editorial process, including drafts, approvals, and versions to ensure transparency and efficiency.

Content Creation and Management

- **Text Formatting:**
Editors should be able to format text with standard styles such as bold, italics, headings, lists, and more for clear presentation.
- **Media Management:**
The system must allow for the easy upload and insertion of images, videos, and other multimedia elements into the content.
- **Version Control:**
Maintain a history of content versions, providing editors with the ability to compare, track, and revert to previous versions if needed.
- **Content Scheduling:**
Content should have the option to be scheduled for future publishing at a specific date and time, enabling planned releases.
- **Content Tagging:**
Editors should be able to tag content with relevant keywords, categories, and metadata to aid in organization and searchability.
- **Content Templates:**
Provide predefined content templates, ensuring consistency and adherence to specific layouts or mandatory fields for various content types.
- **Integration with Tools:**
Seamless integration with external tools such as analytics, search engines, and social media platforms for better content distribution and performance monitoring.

12 Content Archival Requirements

1. Archiving Capabilities

- **Automatic and Manual Archiving:**
The system should support both automatic and manual archiving of various content types, including documents, images, videos, and other files.

- **Content Types:**
Ensure that different types of files (documents, images, videos, etc.) are properly handled and archived.
- 2. **Search and Access**
 - **Searchable Database:**
Implement a searchable database or interface that allows users to efficiently access and retrieve archived content.
 - **Search Functionality:**
Include features for searching by keywords, dates, content types, or other relevant criteria.
- 3. **Version Control**
 - **Version Tracking:**
Track and manage different versions of archived content to ensure that users can access the most recent and accurate version.
 - **Version Management:**
Provide a mechanism to view and revert to previous versions if needed.
- 4. **Access Control**
 - **User Authentication:**
Implement user authentication to control access to archived content, ensuring that only authorized users can view or download files.
 - **Access Permissions:**
Define and manage permissions for different user roles to access specific types of archived content.
- 5. **Data Backup and Preservation**
 - **Backup Procedures:**
Regularly back up archived content to ensure availability in case of technical failures or other disruptions.
 - **Data Integrity:**
Maintain the integrity and security of archived content through robust backup strategies.
- 6. **Compliance and Accessibility**
 - **Accessibility Standards:**
Ensure that archived content complies with accessibility standards to make it available to users with disabilities.
 - **Regulatory Compliance:**
Adhere to relevant regulations and standards for content archiving and management.
- 7. **Content Master Management**
 - **Content Master:**
Maintain a content master that provides easy access to archived content, including log history and previous edits.
 - **Log History:**
Include detailed logs showing edits made, author information, and dates.

- **Content Recovery:**
Implement functionality to recover content from specific dates or versions as required.

13 Contact Forms

1. User Interface

The contact form should be prominently visible and easy to use, with clear and concise instructions for users to follow when filling out the form.

2. Data Input

The form should include fields for users to enter their personal information, such as name, email address, and phone number, as well as a field for users to enter their inquiry or message.

3. Form Validation

The form should include validation checks to ensure that all required fields are completed and that the information entered is in the correct format, such as ensuring email addresses are properly formatted.

4. Data Submission

The form should securely transmit the collected data to the relevant government agency or department.

5. Confirmation

Users should receive a confirmation message or email upon successful submission of the form.

6. Data Storage

The form should store the data submitted by users in a secure database, in compliance with local data privacy and protection laws and regulations.

7. Security

The form should be secure against hacking and unauthorized access, ensuring that user data is protected from unauthorized access.

8. Backend Integration

The form should be connected to a backend system for processing inquiries, handling responses, and managing data.

9. Reporting

The form should include a reporting system to track and analyze inquiries and responses, helping to identify trends and improve service quality.

14 Search Engine Optimization

1. **Keyword Optimization**

Use Relevant Keywords and Phrases: Integrate targeted keywords and phrases throughout the website to enhance search engine rankings.

2. **Website Structure and Navigation**

Optimize Structure and Navigation: Ensure that the website's structure and navigation are designed to facilitate easy crawling and indexing by search engines.

3. **HTML Tags and Meta Information**

- **Implement Heading Tags:** Use heading tags (H1, H2, H3, etc.) to structure content and highlight key information.
- **Use Alt Tags:** Provide descriptive alt tags for images to improve search engine understanding and accessibility.
- **Utilize Meta Tags:** Include relevant meta tags (title, description) to provide search engines with additional context about the content.

4. **Sitemap Implementation**

Develop a sitemap to help search engines understand the website's organization and submit it to Google and other search engines for better indexing.

5. **Analytics and Tracking**

Use analytics and tracking tools to monitor website traffic, search engine performance, and user behavior.

6. **Content Freshness**

Continuously update the website with fresh and relevant content to maintain engagement and improve search engine rankings.

7. **Social Media Integration**

Leverage social media platforms to promote the website, increase visibility, and generate backlinks.

8. **Mobile Optimization**

Enhance mobile loading speed by implementing AMP to improve user experience on mobile devices.

9. **Schema Markup**

Utilize schema markup to enrich search engine results and enhance visibility in search engine listings.

15 Content Migration

- 1 **Content Repurposing and Reuse:** Repurpose significant portions of existing website content for the new website with minimal effort and a streamlined review workflow.
- 2 **Page Mapping:** Map page titles of the new website to corresponding pages or URLs of the current website to ensure consistency and accuracy.
- 3 **Content File Preparation:** Export content from the existing website in a machine-readable format that supports HTML tags, including documents, images, videos, and other media files.
- 4 **Content Upload:** Upload the machine-readable files into the new CMS system, ensuring that the content remains in draft stage until it is reviewed and published manually.
- 5 **Content Review and Publishing:** Allow the CMS team from PFRDA to review and preview content in the new interface before publishing. Provide options for making final edits before the content goes live.
- 6 **New Content:** Incorporate new content required for the new website, which will be provided by the PFRDA team, into the migration process.
- 7 **Self-Service CMS:** Enable the PFRDA team to create and edit content independently using a WYSIWYG (What You See Is What You Get) editor that supports all types of content and media.

16 Web Analytics

The PFRDA (Pension Fund Regulatory and Development Authority) aims to utilize comprehensive website analytics tools to monitor, analyse, and improve its digital platforms' performance and user engagement. The analytics system will support data-driven decision-making, enhance user experience, and ensure continuous optimization of the website and its services. The selected vendor will be responsible for implementing a robust website analytics solution that includes, but is not limited to, the following functionalities:

1. Traffic and Visitor Analytics

- **Total Visitors:** Track the total number of visitors (unique and repeat) to the website over defined time periods.
- **Traffic Sources:** Identify and analyze the origin of traffic, including direct visits, referral sites, social media, email campaigns, and organic/paid search.
- **Visitor Demographics:** Capture demographic information such as age, gender, location, and language preferences (subject to compliance with privacy laws).
- **New vs. Returning Visitors:** Differentiate between new and returning visitors, along with their engagement patterns.
- **Device and Browser Analytics:** Analyze visitor access by device type (desktop, mobile, tablet), operating system, and browser type/version.

2. Behaviour Analytics

- **Page Views and Popular Pages:** Monitor the number of views for each webpage, identifying the most frequently visited pages.
- **Average Session Duration:** Measure the average time users spend on the website.
- **Bounce Rate:** Track the percentage of visitors who leave after viewing only one page.
- **User Flow and Navigation:** Analyse how users navigate through the website, including entry and exit pages, click paths, and drop-off points.
- **Site Search Analytics:** Monitor internal search queries to understand what users are searching for on the website, providing insights into user needs and content gaps.
- **Heatmaps:** Use heatmap tracking to visually represent user interactions, clicks, and scrolling patterns on different pages.

3. Engagement and Interaction Analytics

- **Form Completions and Submissions:** Track how many users interact with and complete forms on the website (e.g., enquiry forms, sign-ups).
- **Download Tracking:** Monitor the number of downloads for key documents or resources available on the website.
- **Call-to-Action (CTA) Performance:** Measure the effectiveness of CTAs (buttons, links) in driving user action, such as subscription or registration.
- **Video Analytics:** Track user interaction with embedded videos, including play rates, completion rates, and drop-off points.

4. Conversion and Goal Tracking

- **Custom Goals and Conversions:** Define and track specific conversion goals (e.g., form submission, newsletter sign-up, pension scheme application) to evaluate the success of the website in meeting key performance indicators (KPIs).
- **Funnel Analysis:** Analyze the step-by-step process users follow before completing a conversion to identify points of friction or drop-offs.
- **Micro and Macro Conversions:** Monitor both smaller interactions (e.g., button clicks) and larger conversions (e.g., application completion) that contribute to user engagement.

6. SEO and Performance Analytics

- **SEO Performance Metrics:** Track key search engine optimisation (SEO) metrics, including keyword rankings, organic search traffic, and backlink analysis.
- **Page Load Speed:** Monitor page load times and identify issues that could affect user experience and SEO rankings.

7. User Experience (UX) and Accessibility Analytics

- **User Satisfaction Metrics:** Implement tools such as on-page feedback forms or surveys to gauge user satisfaction and collect qualitative feedback.
- **Accessibility Tracking:** Measure how accessible the website is to users with disabilities by monitoring compliance with standards like WCAG 2.2 (Web Content Accessibility Guidelines).

8. Security and Compliance Analytics

- **Bot Detection:** Identify and filter out bot traffic to ensure data accuracy.
- **Privacy Compliance:** Ensure all analytics comply with applicable data protection laws, such as the IT Act, 2000, DPDP act 2023 and any future regulations, and offer capabilities for anonymizing user data where needed.
- **Data Retention Policies:** Define and implement policies for data retention, in compliance with legal and regulatory requirements.

9. Reporting and Dashboards

- **Customizable Reports:** Generate reports with customizable data points, time ranges, and visualizations, such as charts and tables.
- **Automated Report Delivery:** Schedule and automate the delivery of reports to key stakeholders (daily, weekly, monthly, or custom intervals).
- **Executive Dashboards:** Provide real-time, high-level dashboards summarizing key performance metrics for decision-makers.
- **Data Exporting:** Enable exporting of data in formats such as CSV, Excel, and PDF for further analysis.

10. Integration with Other Tools

- **Third-Party Integration:** Ensure seamless integration with other tools such as Customer Relationship Management (CRM) systems, marketing platforms, and content management systems (CMS).
- **APIs for Data Access:** Provide APIs to allow secure data access and integration with other business intelligence tools for advanced analytics.

11. Future-proofing and Scalability

- **Scalable Infrastructure:** Ensure the analytics solution is capable of scaling to accommodate increasing traffic and data without degradation in performance.
- **Custom Metrics and KPIs:** Support the development of custom metrics and KPIs to adapt to the evolving needs of PFRDA.

12. Support and Training

- **Ongoing Support:** Provide ongoing technical support for maintaining and upgrading the analytics system.
- **Training and Documentation:** Offer training sessions and detailed documentation for PFRDA personnel to ensure effective use of the analytics platform.

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