
EXPRESSION OF INTEREST (EOI) FOR ENTERPRISE WIDE DIGITIZATION/PAPERLESS SOLUTION

BL/IT/HO/WEB/EOI/201718/0001 dated 06.05.2017



बामर लॉरी एण्ड कं. लिमिटेड
Balmer Lawrie & Co. Ltd.

Contact Person	Ms. Ritu Mittal
Designation	Sr. Manager [IT]
Address	4th Floor 21, Netaji Subhash Road, Balmer Lawrie & Co. Ltd Kolkata - 700001
Email ID	mittal.r@balmerlawrie.com
Website	www.balmerlawrie.com
Last date and time for submission of EOI	26.05.2017 at 15:00 HRS

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Disclaimer

The information contained in the EOI document or information provided subsequently to applicants, whether verbally or form by or on behalf of Balmer Lawrie & Co. Ltd. is provided to applicants on terms and conditions set out in this EOI document and all other terms and conditions subject to which such information is provided.

Expression of Interest (EOI)

To,

M/s _____

Dear Sir/Madam,

Balmer Lawrie & Co. Ltd. invites EOI for “Enterprise wide Digitization/Paperless Solution” for Balmer Lawrie.

1. EOI document can be downloaded from web site www.balmerlawrie.com
2. It shall be the responsibility of the persons submitting the EOI to ensure that the EOI has been submitted in the formats and as per the terms and conditions of the EOI documents. In the event of any doubt regarding the terms and conditions / formats, the person concerned may seek clarifications from the authorized officer of BL. In case any tampering / unauthorized alteration is noticed in the response submitted from the EOI Document available on the BL’s Website, the said EOI shall be summarily rejected and the company shall have no liability whatsoever in the matter. However, deviations, if any, proposed by the participant may be separately indicated for acceptance in a deviation note or otherwise to BL.
3. EOI Participants are expected to submit all necessary documents in support of participation to this EOI. However, in case any further document/ clarifications is found necessary for proper assessment, the participant shall be requested to furnish the same.
4. A participant can have more than one response to EOI (if needed) based on alternative solutions and approach.
5. No cognizance shall be taken for references by the participant to various clauses of Contract / tenders awarded earlier by BL.
6. There should be no conflict of interest of participants with BL. EOI response of any participant may be rejected if a conflict of interest between the participant and BL is detected at any stage.
7. Contact Person: Ms. Ritu Mittal (Sr. Manager [IT]), 4th Floor, 21, Netaji Subhash Road, Balmer Lawrie & Co. Ltd, Kolkata - 700001, Contact No. – 033-22225207, e-mail – mittal.r@balmerlawrie.com
8. Participants are expected to observe the highest standard of ethics during the participation and execution of this EOI. In pursuit of this policy, BL will reject a response to EOI if it determines that the Participant being considered for evaluation has engaged in corrupt or fraudulent practices in competing for the Contract. For the purposes of this provision, the terms set forth below are defined as follows:
 - (i) “Corrupt practice” means the offering, giving, receiving, or soliciting of anything of value to influence the action in the procurement process or in Contract execution; and
 - (ii) “Fraudulent practice” means a misrepresentation of facts in order to influence the procurement process;
 - (iii) “Collusive practice” means designs to establish bid prices at artificial, non-competitive levels to deprive BL of the benefits of competition.
9. EOI Document submission. The participants are requested to provide supporting documents and information as desired in Pre-Qualification Criterion of the EOI Document (Refer Section 4 and Section 5). The Delivery Plan and Schedule should also be enclosed along with Document. Entire set of documents should be submitted in sealed envelope marked as Technical Bid. The participants have to submit their bids in hard and soft copy latest by end of last date and time of submission as mentioned in EOI document schedule.
10. Clarifications of EOI documents

Participant can seek any clarification on EOI document through written mail to mittal.r@balmerlawrie.com at least 4 working days prior to final submission date of EOI document clearly mentioning the participant name and contact no.

BL may at its sole discretion amend the EOI Documents at any time prior to the deadline for submission of EOI bid. However in case of such amendment, the EOI submission date may be extended at the discretion of BL. Amendments made prior to submission of EOI bid will be provided in the form of Corrigendum to the EOI Documents and will be issued and uploaded in the web-site only.

11. The participant may modify or withdraw its EOI after submission, provided that written notice of the modification or withdrawal is received by BL prior to the deadline prescribed for EOI submission.
12. Opening of EOI
 - a. EOI's will be opened as per the plan or with the updated plan as deemed suitable to BL.
13. Preliminary examination of EOI
 - a. BL will examine the EOI's to determine whether they are complete, whether the Documents have been properly signed and in order. Any EOI's found to be non-responsive for any reason or not meeting the criteria specified in the EOI Documents will be rejected by BL and shall not be included for further consideration.
 - b. Prior to the detailed evaluation, BL will determine whether each EOI is complete, and is responsive to the EOI Documents. For the purposes of this determination, a responsive EOI is one that conforms to all the terms, conditions, and specifications of the EOI Documents.
14. Clarifications

During the EOI evaluation, BL may, at its discretion, ask the participant for a written clarification of response to EOI, which the participant is bound to provide within stipulated time i.e. 3 days.
15. Cancellation of EOI

Balmer Lawrie reserves the right to accept or reject any First (Original) or Updated EOI, and to annul the process and reject all EOI's at any time without incurring any liability to the affected participant or any obligation to inform the affected participant of the grounds for such action.
16. Transfer of EOI bid document

Transfer of EOI submitted by one participant to another participant is not permissible.
17. Compliance with company law

The Participant must declare whether the proprietors/ partners of the firm/ Directors of the limited company has any relation with any director of BL including its subsidiaries and Joint Ventures and if so, the details or the relation thereof must be disclosed in the bid response.
18. EOI Evaluation will be done by a prescribed committee of BL.
19. Confidentiality - You are required to maintain strict confidentiality and not to disclose our name during the course of study. In case it becomes necessary to disclose our name then written confirmation shall be obtained from us.
20. The Company reserves the right to alter / modify the scope of study or cancel the proposed study without assigning any reason.

EOI Submission Procedure

The EOI should cover all the points mentioned in section 4 and 5. Response to EOI should be hard copy documents with relevant literature to support, accompanied with a CD/DVD containing ALL soft copies and relevant literature to support as well.

ALL PAGES OF EOI DOCUMENT and SUPPORTING DOCUMENTS SHOULD HAVE PROPER OFFICE SEAL AND SIGNATURE FROM AUTHORIZED PERSONNEL OR PARTICIPATING ORGANIZATION.

All documents should be put in an envelopes which should be sealed and super-scribed thereon

“Expression of Interest for Enterprise wide Digitization/Paperless Solution for Balmer Lawrie” “Reference BL/IT/HO/WEB/EOI/201718/0001 dated 31.01.2017” with full name, address, contact number and e-mail of the participant.

And addressed to:

Ms. Ritu Mittal (Sr. Manager [IT]), 4th Floor, 21, Netaji Subhash Road, Balmer Lawrie & Co. Ltd, Kolkata - 700001, Contact No. – 033-22225207, e-mail – mittal.r@balmerlawrie.com

The Company shall not take any responsibility for any delay or non-receipt. If any of the documents furnished by the tenderer is found to be false/fabricated/bogus, the participant is liable for black listing, forfeiture of the procedure, cancellation of work and criminal prosecution.

The participant found defaulting in submission of requested hard/soft copies of documents to the EOI Inviting Authority on or before the stipulated time in the EOI will not be permitted to participate in the EOI.

The participant has to keep track of any changes by viewing the Addendum / Corrigenda issued by the EOI Inviting Authority on time-to-time basis at www.balmerlawrie.com . Only at the time of inviting EOI, there will be a paper ad. There will be no further paper advertisement on this. Interested participants have to keep referring to the website for further information. The Company calling for EOI shall not be responsible for any claims/problems arising out of this.

Successful participant shall be responsible for completion of the contract in all respect.

Balmer Lawrie reserves the right to accept or reject any EOI or part of EOI or to reject all EOI without assigning any reasons thereof.

This is merely a request for EOI and carries no commitment / obligation to award the contract. EOI does not obligate BL to pay any costs incurred by respondents in the preparation and submission of the EOI. Furthermore, the EOI does not obligate BL to accept or contract for any expressed or implied services. Queries/Clarifications should be addressed by email to mittal.r@balmerlawrie.com

Please acknowledge receipt and confirm your participation in this tender.

Thanking you,
Balmer Lawrie & Co. Ltd

EOI Schedule

S. No.	Particulars	Description
1.	EOI reference number	BL/IT/HO/WEB/EOI/201718/0001 dated 06.05.2017
2.	Date of Publishing of EOI document on the website	06.05.2017 at 14:30 HRS
3.	Last date and time of receiving applicant's clarifications in writing	13.05.2017 at 14:30 HRS
4.	Last date and time for submission of EOI	26.05.2017 at 15:00 HRS
5.	Place of Submission of Bid	Ms. Ritu Mittal, Sr. Manager [IT], 4th Floor, 21, Netaji Subhash Road, Balmer Lawrie & Co. Ltd, Balmer Lawrie & Co. Ltd. Phone No :033-22225207 / +91-9903041334 Email: mittal.r@balmerlawrie.com

1. Introduction

Founded by two Scotsmen, George Stephen Balmer and Alexander Lawrie, in Kolkata, Balmer Lawrie & Co. Ltd. (BL) started its corporate journey as a Partnership Firm on 1st February 1867. Traversing the 146 years gone by, today Balmer Lawrie is a Mini-Ratna I Public Sector Enterprise under the Ministry of Petroleum and Natural Gas, Govt. of India, with a Gross turnover of Rs. 2843 crore and a profit before tax (PBT) of Rs.220 crore. Along with its six Joint Ventures in India and abroad, today it is a much-respected transnational diversified conglomerate with presence in both manufacturing and service sectors. Balmer Lawrie is a market leader in Steel Barrels, Industrial Greases & Specialty Lubricants, Travel and Vacations and Logistics Services. It also has significant presence in most other businesses, it operates, viz, Performance Chemicals, Logistics Infrastructure etc. Each major business is recognized as a Strategic Business Unit and operates with a high degree of operational autonomy.

2. Purpose of the EOI

Paperless Office Solution shall create a long term foundation of having an integrated platform for performing key business functions. Following is the vision of Paperless Office System in a matured state:

1. Establish a centralized document repository & route them electronically, to reduce paper based working & achieve Paperless Office functioning in the company.
2. Provide unified platform to perform all business process in paperless manner.
3. Provide a sustainable and interactive environment for automation of various business processes
4. Provide platform for configuring dynamic, interactive and real-time processes

Note – Response to the EOI doesn't warranty any award of contract or preference by BL to the participants in case if future EOI or Tender happens. The purpose of EOI is solely limited to understand the nature of product/solution, timeline and expertise availability in market place. BL Management and EOI evaluating committee recommendations will be final.

3. Background

Balmer Lawrie is a Mini-Ratna I Public Sector Enterprise under the Ministry of Petroleum and Natural Gas, Government of India. It is a conglomerate with a presence in both manufacturing and service sectors. BL products include steel barrels, industrial greases, specialty lubricants, corporate travel and logistics services. It has a presence in performance chemicals and logistics infrastructure. All these SBUs have a substantial amount of hard copy document which are currently lying in an unsynchronized and unstructured manner.

4. Resolution Approach

a. Hard Copy Document management

- i. All hard copy documents from various business processes would have to be identified from various silos. Subsequently, all documents must be brought in to a common place for scanning & indexing.
- ii. Prior to scanning, documents must be classified & indexed into various categories based

on the business processes.

- iii. Consequently, scanning is done & soft copies of the documents are uploaded in to a common centralized repository based on the pre-defined classification
- iv. Once the scanning is completed, the hard copy documents are boxed and archived at a secure location until the retention period is complete.

b. Soft Copy Document management

- i. Parallel to Hard Copy Document Management, a content repository has to be set up for storing the soft copies of those documents once all the scanning activities are completed. While setting up the repository, a taxonomy structure should be defined along with the set of metadata that needs to be attached with all the documents.
- ii. Once the documents are scanned & uploaded, the soft copies of the documents resides in a centralized document repository with a pre defined taxonomy. While uploading a particular document, a set of metadata has to be defined along with the document.
- iii. The soft copies of the documents in the repository are maintained through a set of record management rules which are used to determine the retention period of the soft copy document.

c. DMS Integration with other applications

- i. Once all the documents are in place, the content repository would be integrated with business applications for automation of business processes.

Strategic Roadmap

BI would like to take a phased approach for the solution the suggested roadmap is as follows but the bidder is free to suggest a better and different approach

Phase I - All relevant documents should be identified, consolidated & indexed after classification to a common content repository along with the corresponding document metadata in a pre defined taxonomy structure. The Content Repository should be facilitate the users to find all documents in a common repository.

Phase II: Scanning & uploading documents

Phase III : The documents in the repository should be linked with business processes.

Phase	Activity	Activity Type
1A - Digitization	Document Discovery – identification, consolidation & classification	Manual
1B - Digitization	Creation of a DMS	Technology implementation

2 - Digitization	Scanning & uploading content	Manual + technology enablement
3 – Paperless office	Linking DMS with Business processes– identify three priority processes and start	Technology implementation/integration
4 – Paperless office	Roll out DMS linking for other processes	Technology implementation/integration

Project Plan with Timelines

- The bidder has to give the complete solution in details which includes all aspects like software, licenses, hardware, human resource, infrastructure requirement and any other aspect not mentioned.
- A brief project/program plan has to be submitted with outline of all the activities required to achieve the end result of Enterprise paperless office solution application. Project can be divided into phases for better understanding.
- A resource allocation plan from the participant for deployment of software/product and services. Allocation plan should also entail the manpower requirement from BL side to execute the project.
- A clear cut stabilization time of the application, warranty/guarantee period of the application is also needed. Resource allocation need to be provided as well.
- Type of support which will be provided during the warranty/guarantee period and SLA's to monitor the same.

3. Pre-Qualification for Participants to EOI

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

Eligibility Criteria:

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

Parameter	Requirement Description	Supporting documents To be submitted
Blacklisted	The company should not be blacklisted by any PSU / CPSE/ Govt. Department in India or abroad	Self-Certification to be provided
Existence	Company should have been in existence in	Certificate of incorporation

	the last 3 years.	
Full Cycle Implementation Experience as Primary Contractor	The Bidder must have full cycle implementation experience in at least one CPSE/ Government Organization in last three years (period ending Bid submission date)	Relevant Purchase Order and Project completion certificate from Customers of the referred projects (at least 3 organizations including 1 PSU)
Power of Attorney	Name and designation of the person authorized to sign the Bid / proposal and all other documents incidental to the RFP	To be submitted on a stamp paper signed by Notary
Bidder Presence	The bidder should have presence in India	Shops & Establishment Certificate from Appropriate Authority
Financial stability of the bidder	The bidders organization should not have incurred losses in the past 2 years	Annual Report

Annexures to be accompanied with Proposal

Annexure: 1 Information Pertaining to Bidder

A. Background Information			
Name			
Corporate Office Address			
Contact Person			
Contact Number			
Fax Number			
E-mail id			
Nature of Business			
Kolkata Office Address (if any)			
Contact Person			
Contact Number			
Fax Number			
Email Id			
Date of incorporation			
No. of employees			
Number of offices			
Network of offices at Metro cities and also within India that provide sales & support for the Annual revenue in the last three Financial Years in			
Does the company have business with any other			
B. Experience			
Number of Successful domestic Implementation of proposed Solution in the recent past with customer reference	Please add additional pages as required		
Turnover (last 3 years)	FY1(`/L)	FY2(`/L)	FY3(`/L)
Profit After Tax	FY1(`/L)	FY2(`/L)	FY3(`/L)
Net Worth	FY1(`/L)	FY2(`/L)	FY3(`/L)
C. Details of Certificate			

Income Tax	Copy of Registration Certificate / Pan card of Organization
Central Sales Tax	Copy of Registration Certificate
State Sales Tax	Copy of Registration Certificate
VAT	Copy of Registration Certificate
Service Tax Registration	Copy of Registration Certificate
Provident Fund	Copy of Registration Certificate

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

To
Chief Information Officer Corporate IT
21 Netaji Subhash Road, (N S Road) Kolkata – 700 001 (India)

Date:

Dear Sir,

EOI: BL/IT/HO/WEB/EOI/201718/0001

dated 06.05.2017

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

OR

I declare the following

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

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

Yours faithfully,

(Signature of the Applicant)

Printed Name

Designation

Seal

Date:

Business Address:

Annexure 3 : Manufacturer’s Authorization Form

[The Applicant shall require the Manufacturer to fill in this Form in accordance with the instructions indicated. This letter of authorization should be on the letterhead of the Manufacturer and should be signed by a person with the proper authority to sign documents that are binding on the Manufacturer. The Applicant shall include it in its EOI]

Date:

To:

WHEREAS

We , who are official manufacturers/OEM vendors ofhaving factories at do hereby authorize to submit an EOI / Proposal, the purpose of which is to provide the Goods and Services included within the scope of work indicated in EOI document , in response to which this proposal is being submitted.

We hereby extend our full guarantee and warranty, with respect to the Goods and services offered by the above firm.

We also confirm that we provide the necessary product support as per Tender Warranty Terms even in absence of participant in future if the participant gets awarded a contract at a later stage.

Signed by the Manufacturer/OEM Vendor: Name:

Title:

Dated on day of

