



**REQUEST FOR  
EXPRESSION OF INTEREST FOR ENGAGEMENT OF A TECHNICAL  
CONSULTANT FOR CORE BANKING SOLUTION (CBS) PLATFORM  
MIGRATION**

**Ref: SBI/GITC/Core Banking-Tech Operation/2025/2026/51 Dated: 30/07/2025**

**Core Banking Tech Revamp Department  
State Bank Global IT Centre,  
2nd Floor, "C" Wing,  
Sector 11, CBD Belapur  
Navi Mumbai – 400 614**

**Schedule of Events**

Sl No	Particulars	Remarks
1	Contact details of issuing department (Name, Designation, Mobile No., Email and office address for sending any kind of correspondence regarding this EOI)	<p>Name: Shri Satish Kumar Lingam Designation: DGM (CB Tech Revamp) Email ID: dgmit.cbtechrevamp@sbi.co.in Contact Number: 9004476785</p> <p>Name: Shri Surendra Bhumerker Designation: Manager (S) Email ID: surendra.bhumerker@sbi.co.in Contact Number: 7710040030</p> <p>Contact Address: State Bank of India, Core Banking Tech Revamp Department State Bank Global IT Centre, 2nd Floor, “C” Wing, Sector 11, CBD Belapur- 400614, Navi Mumbai Email id: cbtechrevamp@sbi.co.in</p>
2	Bid Document Availability including changes/amendments, if any to be issued	EOI may be downloaded from Bank’s website <a href="https://bank.sbi">https://bank.sbi</a> procurement news from <b>30/07/2025</b>
3	Last date for requesting clarification	Upto 17:00 hrs on <b>06/08/2025</b> All communications regarding points / queries requiring clarifications shall be given in writing or by e-mail. (Bidders are requested to send the clarification request to email id: cbtechrevamp@sbi.co.in)
4	Pre - bid Meeting at (Venue)	From 15:00 hrs to 17:00 hrs on <b>08/08/2025</b> through online Microsoft Teams meeting.  The Microsoft Teams Meeting link will be shared over email with those who have requested clarification.
5	Clarifications to queries raised at pre- bid meeting will be provided by the Bank.	On <b>13/08/2025</b>

6	Last date and time for Bid submission	Upto 16:00 hrs on <b>20/08/2025</b>
7	Address for submission of Bids	<a href="https://etender.sbi/SBI/">https://etender.sbi/SBI/</a> _____
8	Date and Time of opening of Technical Bids	17:00 hrs on <b>21/08/2025</b> Authorized representatives of Bidders may be present online during opening of the Technical Bids. However, Technical Bids would be opened even in the absence of any or all of Bidders representatives.
11	Tender Fee	Rs. 20,000/- (Rs. Twenty Thousand Only)  Amount should be deposited in  <b>For NEFT or RTGS</b> A/c No: 4897932113433 (NEFT & RTGS) IFSC: SBIN0011343 Account Name: Subsidy Inward Remittance  <b>SBI to SBI Transfer</b> A/c No: 37608352111 IFSC: SBIN0011343 Account Name: System Suspense Branch Parking A/C  Tender fee will be non-refundable.
12	Contact details of e-Procurement agency appointed for e-procurement	e-Procurement Technologies Limited  Laxmi Karli   Client Service E: <a href="mailto:laxmi@eptl.in">laxmi@eptl.in</a>   M: (+91) 7859800624

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## 1. INVITATION TO BID:

- i. **State Bank of India** (herein after referred to as '**SBI/the Bank**'), having its Corporate Centre at Mumbai, various other offices (LHOs/ Head Offices /Zonal Offices/Global Link Services, Global IT Centre, foreign offices etc.) of State Bank of India, branches/other offices, Subsidiaries and Joint Ventures available at various locations and managed by the Bank (collectively referred to as **State Bank Group or 'SBG'** hereinafter).

This Request for Expression of Interest (EOI) is issued by **the Bank** on behalf of **SBG** for ENGAGEMENT OF A TECHNICAL CONSULTANT FOR CORE BANKING SOLUTION (CBS) PLATFORM MIGRATION

The process will be in two steps as below:

1. Publish Expression of Interest (EOI) for Hiring a Technical Consultant for Core Banking Solution (CBS) Platform Migration.
  2. Publish Request for Proposal (RFP) for Hiring a Technical Consultant for Core Banking Solution (CBS) Platform Migration.
- i. In order to meet the IT requirements, the Bank proposes to invite online EOI from eligible Bidders wishing to be considered for short listing for participating in bidding process of the proposed procurement.
- ii. Bidder shall mean any entity (i.e. juristic person) who meets the eligibility criteria given in **Appendix-B** of this EOI and willing to provide the product and services required by the Bank through RFP process in pursuant to this EOI. The interested Bidders who agree to all the terms and conditions contained in this EOI may submit their Bids with the information desired in this EOI. Consortium bidding is not permitted under this EOI.
- iii. Address for submission of online Bids, contact details including email address for sending communications are given in Schedule of Events of this EOI.
- iv. The objective of this EOI is to identify eligible Bidders who are interested in providing the required product and services and have suitable capacity, capability and experience.
- vi. This EOI document shall not be transferred, reproduced or otherwise used for purpose other than for which it is specifically issued.
- vii. Interested Bidders are advised to go through the entire EOI before submission of online Bids to avoid any chance of elimination. The criteria and the actual process of evaluation

of the responses to this EOI and subsequent selection of the successful Bidder will be entirely at Bank's discretion.

## 2. BACKGROUND:

Core Banking Solution (CBS) **Application** (TCS BaNCS) and **Database** (Oracle) both running on HPE hardware (Integrity Servers – Superdome2 & Integrity Blade Servers) with Itanium processor and HP-UX Operating System (Ver 11.31) since the year 2004.

The Core Banking Solution (CBS) is hosted on HP-UX operating system that is approaching end-of-support (EOS). Therefore, it is imperative to migrate the CBS to an alternate platform which suits the best in terms of support, performance and scalability (both for Application and Database layers).

The platform migration of Core Banking Solution (CBS) is primarily consisting of two major milestones:

- 1) CBS Application Platform Migration
- 2) CBS Database Platform Migration

This Expression of Interest (EOI) is issued to eligible bidders from the qualified, vendor-neutral IT Consultancy firms having in-depth expertise to provide the guidance and technical know-how to carry out the POCs /RFP /Benchmarking/ Scalability/Dynamic Scaling/ Volumetric growth /Migration Approach Roadmap /Implementation/ Go live Support/Post Migration Audit while ensuring minimal/zero downtime for cross-platform migration.

The consultant will be responsible for formulating the strategy, vendor selection, implementation, sizing, benchmarking, transformation and governance while working in close coordination with the Bank's application, Database owners and all dependent stakeholders to ensure end-to-end alignment and expediting on the migration.

The intent is to select eligible Technical Consultant who have relevant skills, expertise and can bring in a strong pool of resources with real-world class experience to the preparation of the Request for Proposal (RFP) including identifying the most suitable hardware solutions from the various offerings available in the market for CBS while ensuring that it comprehensively addressing all technical and operational requirements for a future period of at least 10-15 years.

Please note that the scope may vary depending on organization's requirements and the complexity of the project. It is crucial to engage with experienced professionals and consultants to assist with the required expertise in handling such projects. Details of

indicative qualification parameters like experience and certifications required to perform the scope of work are specified in Appendix-B & Appendix-C.

### 3. **DISCLAIMER:**

- i. The information contained in this EOI or information provided subsequently to Bidder(s) whether verbally or in documentary form/email by or on behalf of SBI, is subject to the terms and conditions set out in this EOI.
- ii. This EOI is not an offer by SBI, but an invitation to receive responses from the eligible Bidders.
- iii. The purpose of this EOI is to provide the Bidder(s) with information to assist preparation of their Bid proposals. This EOI 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 EOI and where necessary obtain independent advices/clarifications. Bank may in its absolute discretion, but without being under any obligation to do so, update, amend or supplement the information in this EOI.
- iv. The Bank, its employees and advisors make 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 EOI or otherwise, including the accuracy, adequacy, correctness, completeness or reliability of the EOI and any assessment, assumption, statement or information contained therein or deemed to form or arising in any way for participation in this EOI.
- v. The Bank also accepts no liability of any nature whether resulting from negligence or otherwise, howsoever caused arising from reliance of any Bidder upon the statements contained in this EOI.
- vi. The Bidder is expected to examine all instructions, forms, terms and specifications in this EOI. Failure to furnish all information required under this EOI or to submit a Bid not substantially responsive to this EOI in all respect will be at the Bidder's risk and may result in rejection of the Bid.
- vii. The issue of this EOI does not imply that the Bank is bound to select a Bidder or subsequently to award the contract to the shortlisted Bidder, as the case may be, for the project and the Bank reserves the right to reject all or any of the Bids or Bidders without assigning any reason.

#### 4. DEFINITIONS:

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

- i. **“The Bank”** ‘means the State Bank of India (including domestic branches and foreign offices), Subsidiaries and Joint Ventures, where the Bank has ownership of more than 50% of voting securities or the power to direct the management and policies of such Subsidiaries and Joint Ventures.
- ii. **“Bidder/Channel Partner”** means an eligible entity/firm submitting the Bid in response to this EOI.
- iii. **“Bid”** means the written reply or submission of response to this EOI.

#### 5. ELIGIBILITY AND TECHNICAL CRITERIA/SCOPE OF WORK:

- i. Bid is open to all Bidders who meet the eligibility and technical criteria/scope of work as given in **Appendix-B & Appendix-C** of this EOI. The Bidder has to submit the documents substantiating eligibility criteria as mentioned in this EOI document.
  - (a) If any Bidder submits Bid on behalf of Principal/OEM, the same Bidder shall not submit a Bid on behalf of another Principal/OEM under the EOI. Bid submitted with options of multiple OEMs shall also be considered Bid submitted on behalf of multiple OEMs.
  - (b) Either the Bidder on behalf of Principal/OEM or Principal/OEM itself is allowed to Bid, however both cannot Bid simultaneously.

#### 6. COST OF BID DOCUMENT:

The participating Bidders shall bear all the costs associated with or relating to the preparation and submission of their Bids including but not limited to preparation, copying, postage, delivery fees, expenses associated with any demonstration or presentations which may be required by the Bank or any other costs incurred in connection with or relating to their Bid. The Bank shall not be liable in any manner whatsoever for the same or for any other costs or other expenses incurred by a Bidder regardless of the conduct or outcome of the bidding process.

#### 7. CLARIFICATION AND AMENDMENTS ON EOI/PRE-BID MEETING:

- i. Bidder requiring any clarification on EOI may notify the Bank in writing strictly as per the format given in **Appendix-E** at the address/by e-mail within the date/time mentioned in the Schedule of Events.



- ii. All queries to be raised in the pre-bid meeting will relate to the EOI alone and no queries related to detailed analysis of scope of work, payment terms and mode of selection will be entertained. These issues will be amply clarified at the RFP stage.
- iii. A pre-Bid meeting will be held in person or online on the date and time specified in the Schedule of Events which may be attended by the authorized representatives of the Bidders interested to respond to this EOI.
- iv. The queries received (without identifying source of query) and response of the Bank thereof will be posted on the Bank's website or conveyed to the Bidders.
- v. The Bank reserves the right to amend, rescind or reissue the EOI, at any time prior to the deadline for submission of Bids. The Bank, for any reason, whether, on its own initiative or in response to a clarification requested by a prospective Bidder, may modify the EOI, by amendment which will be made available to the Bidders by way of corrigendum/addendum. The interested parties/Bidders are advised to check the Bank'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 the Bank, if any, have been taken into consideration before submitting the Bid. Such amendments/clarifications, if any, issued by the Bank will be binding on the participating Bidders. Bank will not take any responsibility for any such omissions by the Bidder. The Bank, 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. Nothing in this EOI or any addenda/corrigenda or clarifications issued in connection thereto is intended to relieve Bidders from forming their own opinions and conclusions in respect of the matters addresses in this EOI or any addenda/corrigenda or clarifications issued in connection thereto.
- vi. Queries received after the scheduled date and time will not be responded/acted upon.

#### **8. CONTENTS OF EOI DOCUMENT:**

- i. The Bidder must thoroughly study/analyse and properly understand the contents of this EOI, its meaning and impact of the information contained therein.
- ii. Failure to furnish all information required in this EOI or submission of Bid not responsive to this EOI in any respect will be at the Bidder's risk and responsibility and the same may finally result in rejection of its Bid. The Bank has made considerable effort to ensure that accurate information is contained in this EOI and is supplied solely as guidelines for Bidders.

- iii. The Bid prepared by the Bidder, as well as all correspondences and documents relating to the Bid exchanged by the Bidder and the Bank and supporting documents and printed literature shall be submitted in English.
- iv. The information provided by the Bidders in response to this EOI will become the property of the Bank and will not be returned. Incomplete information in Bid document may lead to non-consideration of the proposal.

#### 9. BID PREPARATION AND SUBMISSION:

- i. The Bid is to be submitted on portal of e-Procurement agency for EOI of \_\_\_\_\_ in response to the EOI No. **SBI/GITC/Core Banking-Tech Operation/2025/2026/51 Dated: 30/07/2025**. Documents mentioned below are to be uploaded on portal of e-Procurement agency with digital signature of authorised signatory:
  - (a) Index of all the documents, letters, bid forms etc. submitted in response to EOI along with page numbers.
  - (b) Bid covering letter/Bid form on the lines of **Appendix-A** on Bidder's letter head.
  - (c) Proof of remittance of Tender Fee as specified in this document.
  - (d) Specific response with supporting documents in respect of Eligibility Criteria as mentioned in **Appendix-B** and technical criteria/scope of work on the lines of **Appendix-C**.
  - (e) Bidder's details as per **Appendix-D** on Bidder's letter head.
  - (f) Audited financial statement and profit and loss account statement as mentioned in Part-II.
  - (g) A copy of board resolution along with copy of power of attorney (POA wherever applicable) showing that the signatory has been duly authorized to sign the Bid document.
  - (h) If applicable, copy of registration certificate issued by competent authority as mentioned in **SI No 2 of Eligibility Criteria** under **Appendix-B**.

#### ii. Bidders may please note:

- (a) While submitting the Technical Bid, literature on the proposed solution/services should be segregated and kept together in one section.
- (b) The Bid document shall be complete in accordance with various clauses of the EOI document or any addenda/corrigenda or clarifications issued in connection thereto, duly signed by the authorized representative of the Bidder. Board resolution authorizing representative to Bid and make commitments on behalf of the Bidder is to be attached.
- (c) It is mandatory for all the Bidders to have class-III Digital Signature Certificate (DSC) (in the name of person who will sign the Bid) from any of the licensed certifying agency to participate in this EOI. DSC should be in the name of the

authorized signatory. It should be in corporate capacity (that is in Bidder capacity).

- (d) If deemed necessary, the Bank may seek clarifications on any aspect from the Bidder. However, that would not entitle the Bidder to change or cause any change in the substances of the Bid already submitted.
- (e) The Bidder may also be asked to give presentation for the purpose of clarification of the Bid.
- (f) The Bidder must provide specific and factual replies to the points raised in the EOI.
- (g) The Bid shall be typed or written and shall be digitally signed by the Bidder or a person or persons duly authorized to bind the Bidder to the Contract.
- (h) All the enclosures (Bid submission) shall be serially numbered.
- (i) The Bank reserves the right to reject Bids not conforming to above.
- (j) 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 the Bidder. Board resolution authorizing representative to Bid and make commitments on behalf of the Bidder is to be attached.
- (k) Bidder(s) should prepare and submit their online Bids well in advance before the prescribed date and time to avoid any delay or problem during the bid submission process. The Bank shall not be held responsible for any sort of delay or the difficulties faced by the Bidder(s) during the submission of online Bids.
- (l) Bidder(s) should ensure that the Bid documents submitted should be free from virus and if the documents could not be opened, due to virus or otherwise, during Bid opening, the Bid is liable to be rejected.

#### **10. DEADLINE FOR SUBMISSION OF BIDS:**

- i. Bids must be submitted online on portal of e-Procurement agency by the date and time mentioned in the “Schedule of Events”.
- ii. In the event of the specified date for submission of Bids being declared a holiday for the Bank, the Bids will be received upto the appointed time on the next working day.
- iii. In case the Bank extends the scheduled date of submission of Bid document, the Bids shall be submitted by the time and date rescheduled. All rights and obligations of the Bank and Bidders will remain the same.

#### **11. MODIFICATION AND WITHDRAWAL OF BIDS:**

- i. The Bidder may modify or withdraw its Bid after the Bid’s submission, provided that modification, including substitution or withdrawal of the Bids, is received on e-

procurement portal, prior to the deadline prescribed for submission of Bids.

- ii. No modification in the Bid shall be allowed, after the deadline for submission of Bids.

## **12. BIDDING PROCESS/OPENING OF TECHNICAL BIDS:**

- i. All Bids 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 Bids will be opened in the presence of representatives of the Bidders who choose to attend the same on portal of e-Procurement agency. However, Bids may be opened even in the absence of representatives of one or more of the Bidders.
- ii. Prior to the detailed evaluation, the Bank will determine the responsiveness of each Bid to the EOI. For purposes of these Clauses, a responsive Bid is one, which conforms to all the terms and conditions of the EOI in toto, without any deviation.
- iii. If a Bid is not responsive, it will be rejected by the Bank and will not subsequently be made responsive by the Bidder by correction of the non-conformity.
- iv. After examining the EOI, some or all of the Bidders may be asked to make presentation of the solution and demonstrate proof of concept (POC). The Bidder shall bear all costs associated with submission of EOI, presentation/POC desired by the Bank. The Bank shall not be responsible or liable for any cost thereof, regardless of the conduct or outcome of the process.
- v. SBI may shortlist the Bidders who fulfill the eligibility and technical criteria specified in this EOI, have solution/services as per the requirement of the Bank and are agreeing to abide by the terms and conditions of the Bank. Bank's judgment in this regard will be final.
- vi. Bank may issue a Request for Proposal (RFP) to shortlisted Bidder for next process of procurement. However, please note that short listing of Bidders should not be treated as a contract for the proposed work.
- vii. Nothing contained in this EOI shall impair the Bank's Right to issue 'Open RFP' on the proposed solution/services.
- viii. Bidders will be advised about shortlisting of their EOIs or otherwise. However, Bidders will not be provided with information about comparative position of their EOIs with that of others.

### 13. CONFLICT OF INTEREST:

- i. Bidder shall not have a conflict of interest (the “Conflict of Interest”) that affects the bidding Process. Any Bidder found to have a Conflict of Interest shall be disqualified without prejudice to any other right or remedy that may be available to the Bank under the EOI and/ or the subsequent RFP or otherwise.
- ii. Without limiting the generality of the above, a Bidder shall be deemed to have a Conflict of Interest affecting the bidding Process, if:
  - (a) the Bidder, its Member or Associate (or any constituent thereof) and any other Bidder, its Member or any Associate thereof (or any constituent thereof) have common controlling shareholders or other ownership interest; provided that this disqualification shall not apply in cases where the direct or indirect shareholding of a Bidder, its Member or an Associate thereof (or any shareholder thereof having a shareholding of more than 5% (five per cent) of the paid up and subscribed share capital of such Bidder, Member or Associate, as the case may be) in the other Bidder, its Member or Associate, has less than 5% (five per cent) of the subscribed and paid up equity share capital thereof; provided further that this disqualification shall not apply to any ownership by a bank, insurance company, pension fund or a public financial institution referred to in section 2(72) of the Companies Act, 2013. For the purposes of this Clause, indirect shareholding held through one or more intermediate persons shall be computed as follows: (aa) where any intermediary is controlled by a person through management control or otherwise, the entire shareholding held by such controlled intermediary in any other person (the “Subject Person”) shall be taken into account for computing the shareholding of such controlling person in the Subject Person; and (bb) subject always to sub-clause (aa) above, where a person does not exercise control over an intermediary, which has shareholding in the Subject Person, the computation of indirect shareholding of such person in the Subject Person shall be undertaken on a proportionate basis; provided, however, that no such shareholding shall be reckoned under this sub-clause (bb) if the shareholding of such person in the intermediary is less than 26% of the subscribed and paid up equity shareholding of such intermediary; or
  - (b) a constituent of such Bidder is also a constituent of another Bidder; or
  - (c) such Bidder, its Member or any Associate thereof receives or has received any direct or indirect subsidy, grant, concessional loan or subordinated debt from any other Bidder, its Member or Associate, or has provided any such subsidy, grant,

concessional loan or subordinated debt to any other Bidder, its Member or any Associate thereof; or

- (d) such Bidder has the same legal representative for purposes of this Bid as any other Bidder; or
- (e) such Bidder, or any Associate thereof, has a relationship with another Bidder, or any Associate thereof, directly or through common third party/ parties, that puts either or both of them in a position to have access to each other's information about, or to influence the Bid of either or each other; or
- (f) such Bidder or any of its affiliates thereof has participated as a consultant to the Bank in the preparation of any documents, design or technical specifications of the EOI.

iii. For the purposes of this EOI, Associate means, in relation to the Bidder, a person who controls, is controlled by, or is under the common control with such Bidder (the "Associate"). As used in this definition, the expression "control" means, with respect to a person which is a company or corporation, the ownership, directly or indirectly, of more than 50% (fifty per cent) of the voting shares of such person, and with respect to a person which is not a company or corporation, the power to direct the management and policies of such person by operation of law or by contract.

#### **14. CODE OF INTEGRITY AND DEBARMENT/BANNING:**

- i. The Bidder and their respective officers, employees, agents and advisers shall observe the highest standard of ethics during the bidding Process. Notwithstanding anything to the contrary contained herein, the Bank shall reject Bid without being liable in any manner whatsoever to the Bidder if it determines that the Bidder has, directly or indirectly or through an agent, engaged in corrupt/fraudulent/coercive/undesirable or restrictive practices in the bidding Process.
- ii. 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 EOI process or execution of contract. Failure to do so would amount to violation of this code of integrity.
- iii. Any Bidder needs to declare any previous transgressions of such a code of integrity with any entity in any country during the last three years or of being debarred by any other procuring entity. Failure to do so would amount to violation of this code of integrity.
- iv. For the purposes of this clause, the following terms shall have the meaning hereinafter, respectively assigned to them:

- (a) **“Corrupt practice”** means making offers, solicitation or acceptance of bribe, rewards or gifts or any material benefit, in exchange for an unfair advantage in the procurement process or to otherwise influence the procurement process or contract execution;
- (b) **“Fraudulent practice”** means any omission or misrepresentation that may mislead or attempt to mislead so that financial or other benefits may be obtained or an obligation avoided. This includes making false declaration or providing false information for participation in a EOI process or to secure a contract or in execution of the contract;
- (c) **“Coercive practice”** means harming or threatening to harm, persons or their property to influence their participation in the procurement process or affect the execution of a contract;
- (d) **“Anti-competitive practice”** means any collusion, bid rigging or anti-competitive arrangement, or any other practice coming under the purview of the Competition Act, 2002, between two or more bidders, with or without the knowledge of the Bank, that may impair the transparency, fairness and the progress of the procurement process or to establish bid prices at artificial, non-competitive levels;
- (e) **“Obstructive practice”** means materially impede the Bank’s or Government agencies investigation into allegations of one or more of the above mentioned prohibited practices either by deliberately destroying, falsifying, altering; or by concealing of evidence material to the investigation; or by making false statements to investigators and/or by threatening, harassing or intimidating any party to prevent it from disclosing its knowledge of matters relevant to the investigation or from pursuing the investigation; or by impeding the Bank’s rights of audit or access to information;

**v. Debarment/Banning**

Empanelment/participation of Bidders and their eligibility to participate in the Bank’s procurements is subject to compliance with code of integrity and performance in contracts as per terms and conditions of contracts. Following grades of debarment from empanelment/participation in the Bank’s procurement process shall be considered against delinquent Vendors/Bidders:

- (a) **Holiday Listing (Temporary Debarment - suspension):**



Whenever a Bidder is found lacking in performance, in case of less frequent and less serious misdemeanors, the Bidders may be put on a holiday listing (temporary debarment) for a period upto 12 (twelve) months. When a Bidder is on the holiday listing, he is neither invited to bid nor are his bids considered for evaluation during the period of the holiday. The Bidder is, however, not removed from the list of empaneled vendors, if any. Performance issues which may justify holiday listing of the Vendor are:

- Vendors who have not responded to requests for quotation/tenders consecutively three times without furnishing valid reasons, if mandated in the empanelment contract (if applicable);
- Repeated non-performance or performance below specified standards (including after sales services and maintenance services etc.);
- Bidders undergoing process for removal from empanelment/participation in procurement process or banning/debarment may also be put on a holiday listing during such proceedings.

**(b) Debarment from participation including removal from empanelled list**

Debarment of a delinquent Bidder (including their related entities) for a period (one to two years) from the Bank's procurements including removal from empanelment, wherever such Bidder is empaneled, due to severe deficiencies in performance or other serious transgressions. Reasons which may justify debarment and/or removal of the Bidder from the list of empaneled vendors are:

- Without prejudice to the rights of the Bank under Clause 14(i) hereinabove, if a Bidder is found by the Bank 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, such Bidder shall not be eligible to participate in any EOI/RFP issued by the Bank during a period of 2 (two) years from the date of debarment.
- The 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 or qualify in the review for empanelment;
- If Bidder ceases to exist or ceases to operate in the category of requirements for which it is empaneled;
- Bankruptcy or insolvency on the part of the Bidder as declared by a court of law; or
- Banning by Ministry/Department or any other Government agency;



- 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 into a Contract; or (iii) fails to provide performance guarantee or any other document or security required in terms of the RFP documents;
- If the Central Bureau of Investigation/CVC/C&AG or Vigilance Department of the Bank or any other investigating agency recommends such a course in respect of a case under investigation;
- Employs a Government servant or the Bank's Officer within two years of his retirement, who has had business dealings with him in an official capacity before retirement; or
- Any other ground, based on which the Bank considers, that continuation of Contract is not in public interest.
- If there is strong justification for believing that the partners/directors/proprietor/agents of the firm/company has 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.

**(c) Banning from Ministry/Country-wide procurements**

For serious transgression of code of integrity, a delinquent Bidder (including their related entities) may be banned/debarred from participation in a procurement process of the Bank including procurement process of any procuring entity of Government of India for a period not exceeding three years commencing from the date of debarment.

**15. GOVERNING LANGUAGE:**

The governing language shall be English.

**16. APPLICABLE LAW:**

The Contract shall be interpreted in accordance with the laws of the Union of India and shall be subjected to the exclusive jurisdiction of courts at Mumbai.

**17. TENDER FEE:**

Non-refundable Tender Fee should be directly credited to the designated account as mentioned in Schedule of Events. Proof of remittance of Tender Fee in the designated account should be enclosed with the technical bid. The Bids without tender fee will not be considered valid.

#### 18. EXEMPTION OF EMD AND TENDER FEE:

Micro & Small Enterprises (MSE) units and Start-ups\* are exempted from payment of EMD and tender fee provided the products and/or services they are offering, are manufactured and/or services rendered by them. Exemption as stated above is not applicable for selling products and/or services, manufactured/ rendered by other companies.

Bidder should submit supporting documents issued by competent Govt. bodies to become eligible for the above exemption.

**Bidders may please note:**

- i. NSIC certificate/ Udyog Aadhar Memorandum/Udyam Registration Certificate should cover the items tendered to get EMD/tender fee exemptions. Certificate/Memorandum should be valid as on due date / extended due date for Bid submission.
- ii. “Start-up” company should enclose the valid Certificate of Recognition issued by Department for Promotion of Industry and Internal Trade (DPIIT), (erstwhile Department of Industrial Policy and Promotion), Ministry of Commerce & Industry, Govt. of India with the technical bid.
- iii. \*Start-ups which are not under the category of MSE shall not be eligible for exemption of tender fee.
- iv. Bidder who solely on its own, fulfils each eligibility criteria condition as per the RFP terms and conditions and who are having MSE or Start-up company status, can claim exemption for EMD/ tender fee.
- v. If all these conditions are not fulfilled or supporting documents are not submitted with the technical Bid, then all those Bids without tender fees /EMD will be summarily rejected and no queries will be entertained.

#### 19. NOTICES:

Any notice given by one party to the other pursuant to this EOI shall be sent to other party in writing and 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.

## 20. OTHER TERMS & CONDITIONS

- i. Lodgement of an EOI is evidence of a Bidder's consent to comply with the terms and condition of Request for EOI process and subsequent bidding process. If a Bidder fails to comply with any of the terms, its EOI may be summarily rejected.
- ii. Willful misrepresentation of any fact within the Bid will lead to the disqualification of the Bidder without prejudice to other actions that the Bank may take. All the submissions, including any accompanying documents, will become property of the Bank. The Bidders shall be deemed to license, and grant all rights to the Bank, 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.
- iii. Bidders must advise the Bank immediately in writing of any material change to the information contained in the EOI application, including any substantial change in their ownership or their financial or technical capacity. Copies of relevant documents must be submitted with their advices. For shortlisted Bidders, this requirement applies until a contract is awarded as a result of subsequent bidding process.
- iv. Shortlisted Bidders must not advertise or publish the same in any form without the prior written consent of SBI.
- v. Brief overview of the proposed procurement/scope of work given in this document may be further elaborated, viz., more details may be included in the Request for Proposal (RFP) document to be issued as a result of evaluation process of EOIs.
- vi. The Bank reserves the right to formulate any terms & conditions while framing the RFP, even if these are in variance with the terms provided in this EOI. Further, the Bidders shall have no claim in this regard.
- vii. The Bank shall have the right to cancel the EOI process itself at any time, without thereby incurring any liabilities to the affected Bidders. Reasons for cancellation, as determined by the Bank in its sole discretion include but are not limited to, the following:
  - a. Services contemplated are no longer required.
  - b. Scope of work not adequately or clearly defined due to unforeseen circumstance and/or factors and/or new developments.
  - c. The project is not in the best interest of the Bank.
  - d. Any other reason.

**PART-II**

**Appendix –A**

**BID FORM (TECHNICAL BID)**

[On Bidder's letter head]

Date: \_\_\_\_\_

To:

< Address of tendering office >

Dear Sir,

**Ref: SBI/GITC/Core Banking-Tech Operation/2025/2026/51 Dated: 30/07/2025**

We have examined the above EOI, the receipt of which is hereby duly acknowledged and subsequent pre-bid clarifications/ modifications / revisions, if any, furnished by the Bank. We submit our bid and shall abide by the terms and conditions spelt out in the EOI.

**i. While submitting this Bid, we certify that:**

- The undersigned is authorized to sign on behalf of the Bidder and the necessary support document delegating this authority is enclosed to this letter.
  - We declare that we are not in contravention of conflict of interest obligation mentioned in this EOI.
  - We have not induced or attempted to induce any other Bidder to submit or not to submit a Bid for restricting competition.
- ii. We undertake that, in competing for the above EOI, we will strictly observe the laws against fraud and corruption in force in India namely "Prevention of Corruption Act 1988".
- iii. We undertake that we will not offer, directly or through intermediaries, any bribe, gift, consideration, reward, favour, any material or immaterial benefit or other advantage, commission, fees, brokerage or inducement to any official of the Bank, connected directly or indirectly with this EOI process, or to any person, organisation or third party related to this EOI in exchange for any advantage in the EOI, evaluation and shortlisting.
- iv. We undertake that we will not resort to canvassing with any official of the Bank, connected directly or indirectly with the EOI process to derive any undue advantage. We also understand that any violation in this regard, will result in disqualification of bidder from further bidding process.
- v. It is further certified that the contents of our Bid are factually correct. We have not sought any deviation to the terms and conditions of this EOI. We also accept that in the event of any information / data / particulars proving to be incorrect, the Bank will have right to

disqualify us from the EOI or any subsequent bidding process without prejudice to any other rights available to the Bank.

- vi. We certify that while submitting our Bid document, we have not made any changes in the contents of the EOI, read with its amendments/clarifications provided by the Bank.
- vii. We understand that you are not bound to accept any Bid you may receive and you may reject all or any Bid without assigning any reason or giving any explanation whatsoever.
- viii. We hereby certify that our name does not appear in any “Caution” list of RBI / IBA or any other regulatory body for outsourcing activity.
- ix. We hereby certify that on the date of submission of Bid for this EOI, we are not under any debarment/blacklist period for breach of contract/fraud/corrupt practices by any Scheduled Commercial Bank/ Public Sector Undertaking/ State or Central Government or their agencies/departments.
- x. We hereby certify that on the date of submission of Bid, we do not have any Service Level Agreement pending to be signed with the Bank for more than 6 months from the date of issue of purchase order.
- xi. We hereby certify that we have read the clauses contained in O.M. No. 6/18/2019-PPD, dated 23.07.2020 order (Public Procurement No. 1), order (Public Procurement No. 2) dated 23.07.2020 and order (Public Procurement No. 3) dated 24.07.2020 regarding restrictions on procurement from a bidder of a country which shares a land border with India. We further certify that we and our OEM are not from such a country or if from a country, has been registered with competent authority. We certify that we and our OEM fulfil all the requirements in this regard and are eligible to participate in this EOI.
- xii. We, further, hereby undertake and agree to abide by all the terms and conditions stipulated by the Bank in the EOI document.

Dated this ..... day of ..... 202

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Name)

(In the capacity of)

Duly authorised to sign Bid for and on behalf of

\_\_\_\_\_  
**Seal of the company.**

**Appendix-B**

**Bidder's 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:

S. No.	Eligibility Criteria	Compliance (Yes/No)	Documents to be submitted
1.	The Bidder must be an Indian Company/ LLP /Partnership firm /Branch office of a foreign company or any other juristic entity, registered under applicable law / regulations in India to provide consultancy services in India.		Certificate of Incorporation issued by Registrar of Companies and full address of the registered office along with Memorandum & Articles of Association/ Partnership Deed.
2.	The Bidder (including its OEM, if any) must comply with the requirements contained in O.M. No. 6/18/2019-PPD, dated 23.07.2020 order (Public Procurement No. 1), order (Public Procurement No. 2) dated 23.07.2020 and order (Public Procurement No. 3) dated 24.07.2020		Bidder should specifically certify in <b>Appendix A</b> in this regard and provide copy of registration certificate issued by competent authority wherever applicable.
3.	The Bidder must have an average turnover of minimum Rs. 100 Crore during last 3 (three) financial year(s) i.e. FY 2022-23, FY 2023-24 and FY 2024-25.		Copy of the audited financial statement for required financial years. (Certificate from statutory auditor for preceding/current 3 (three) year may be submitted.)
4.	The Bidder should be profitable organization on the basis of profit before tax (PBT) for at least 02 (two) out of last 03 (Three) financial years mentioned in para 3 above.		Copy of the audited financial statement along with profit and loss statement for corresponding years and / or Certificate of the statutory auditor.
5.	Bidder should have experience of minimum 05 (Five) years in providing the Similar Consultancy Services preferably in the BFSI Sector.		Copy of the order and / or Certificate of completion of the work. The Bidder should also furnish user acceptance report.

6.	Client references and contact details (email/ landline/ mobile) of customers for whom the Bidder has executed similar Core Banking Solution (CBS) Platform Migration/ Core Technical Revamp projects in BFSI Sector in India. Start and End Date of the Project to be mentioned. At least 02 (two) client references are required		Bidder should specifically confirm on their letter head in this regard as per <b>Appendix-F</b>
7.	Past/present litigations, disputes, if any (Adverse litigations could result in disqualification, at the sole discretion of the Bank)		Brief details of litigations, disputes, if any are to be given on Company's letter head.
8.	Bidders should not be under debarment/blacklist period for breach of contract/fraud/corrupt practices by any Scheduled Commercial Bank/ Public Sector Undertaking / State or Central Government or their agencies/ departments on the date of submission of bid for this EOI.		Bidder should specifically certify in <b>Appendix A</b> in this regard.
9.	The Bidder should not have any Service Level Agreement pending to be signed with the Bank for more than 6 months from the date of issue of purchase order.		Bidder should specifically certify in <b>Appendix A</b> in this regard.
10.	The Bidder (including its OEM, if any) should either be Class-I or Class-II local supplier as defined under this EOI.		Certificate of local content to be submitted as per <b>Appendix-G</b> .
11.	Must have experience in <b>Minimum 03</b> IT-Tech Stack Migration consultancy involving hardware sizing/ Database Migration strategy/ Infrastructure Upgrade in BFSI Sector.		Copy of the order and / or Certificate of completion of the work. The Bidder should also furnish user acceptance report.
12.	<b>Minimum 2</b> Core Banking Solution (CBS) Infrastructure Migration advisory engagement in last 10 Years for Scheduled Commercial Bank		Copy of the order and / or Certificate of completion of the work. The Bidder should also furnish user acceptance report.
13.	Must have managed <b>Preferably Minimum 2</b> large scale IT		Copy of the order and / or Certificate of completion of the



	Infrastructure Transformation including Vendor Selection, Solution review and Implementation governance in BFSI Sector		work. The Bidder should also furnish user acceptance report.
14.	The resource proposed to be provided for the proposed engagement should be on the payroll of the company.		This has to be certified on the letter head of the Bidder.

Documentary evidence must be furnished against each of the above criteria along with an index. All documents must be signed by the authorized signatory of the Bidder. Relevant portions, in the documents submitted in pursuance of eligibility criteria, should be highlighted.

**Eligibility criteria mentioned at SI No 2 to 5 in table above are relaxed for Startups subject to their meeting of quality and technical specifications. Bidder to note the followings:**

- i. Start-up” company should enclose the valid Certificate of Recognition issued by Department for Promotion of Industry and Internal Trade (DPIIT), (erstwhile Department of Industrial Policy and Promotion), Ministry of Commerce & Industry, Govt. of India with the technical bid.
- ii. Bidder who solely on its own, fulfils each eligibility criteria condition as per the RFP terms and conditions and who are having Start-up company status, can claim exemption for eligibility criteria mentioned at SI No 2 to 5 in table above.  
Exemption as stated above is not applicable for selling products and/or services, manufactured/ rendered by other companies.
- iii. If all these conditions are not fulfilled or supporting documents are not submitted with the technical Bid, then all those Bids will be summarily rejected, and no queries will be entertained.

**For the purpose of Preference to Make in India, Order 2017 (PPP-MII Order) and revision thereto:**

**“Local content”** means the amount of value added in India which shall, unless otherwise prescribed by the Nodal Ministry, be the total value of the item procured (excluding net domestic indirect taxes) minus the value of imported content in the item (including all customs duties) as a proportion of the total value, in percent.

**“Class-I local supplier”** means a supplier or service provider whose product or service offered for procurement meets the minimum local content as prescribed for ‘Class-I local supplier’ hereunder.

**“Class-II local supplier”** means a supplier or service provider whose product or service offered for procurement meets the minimum local content as prescribed for ‘Class-II local

supplier' hereunder. Class-II local supplier shall not get any purchase preference under this RFP.

**“Non-local supplier”** means a supplier or service provider whose product or service offered for procurement has ‘local content’ less than that prescribed for ‘Class-II local supplier’ under this RFP.

**“Minimum Local content”** for the purpose of this RFP, the ‘local content’ requirement to categorize a supplier as ‘Class-I local supplier’ is minimum 50%. For ‘Class-II local supplier’, the ‘local content’ requirement is minimum 20%. If Nodal Ministry/Department has prescribed different percentage of minimum ‘local content’ requirement to categorize a supplier as ‘Class-I local supplier’/ ‘Class-II local supplier’, same shall be applicable.

**Verification of local content**

The ‘Class-I local supplier’/ ‘Class-II local supplier’ at the time of submission of bid shall be required to provide a certificate as per **Appendix-H** from the statutory auditor or cost auditor of the company (in the case of companies) or from a practicing cost accountant or practicing chartered accountant (in respect of suppliers other than companies) giving the percentage of local content requirement for ‘Class-I local supplier’/ ‘Class-II local supplier’ as the case may be.

**Name & Signature of authorised signatory**

**Seal of Company**

**Appendix-C**

**Technical Criteria/Scope of Work**

**Architecture:** Comprehensive evaluation of the existing hardware infrastructure of Core Banking Solution (CBS) and recommending the best-suited hardware solutions as per the latest technology trends that will remain relevant and not become obsolete for next 10-15 years.

**Functionality related:** In depth analysis of Core Banking Solutions (CBS) covering Functional/Technical requirements/ Performance, Scalability, Capacity growth/ Regulatory/Compliance, Security, Disaster Recovery drills/ Recovery Time Objectives (RTO)/Recovery Point Objectives (RPO)/ Gap analysis between current capabilities and desired state etc.

**Deployment methodologies:** Future state architecture & transformation roadmap for Application and Database Migration in Multi-DC deployment for high-availability.

**Services required:** PMO Activities, BOM Certification; POCs, RFP preparation process, Hardware Vendor Selection, Benchmarking, Scalability, Dynamic Scaling, Volumetric growth, Migration Approach Roadmap, Change Management/ Implementation, Go live Support, Post Migration Audit etc.

**Period for completion of the project:** 24 Months (Tentatively)

A list of some of the key deliverables and scope of work from the consultant is appended. Please note that the list is an indicative one and not exhaustive, the consultant is expected to do thorough analysis and provide the appropriate recommendations and suggestions after evaluating the existing Core Banking Solution (CBS) environment.

The Bidder should describe how their proposed solution will meet the required parameters and provide details thereof in their EOI proposal on the following lines.

Sl No	Parameters	Compliance (Yes/No)
1	Conducting a thorough assessment of the current hardware infrastructure.	
2	Recommending the best-suited hardware solutions for the Core Banking Solution (CBS) application as per the latest technology available in the industry.	
3	Advising the sizing for the servers (i.e., compute, memory, storage and associated components) considering the current workloads and future capacity projections.	

4	Plan and recommend the approach to be taken for carrying out/Reviewing the Application, Database migration POCs or vetting the ongoing POCs on proposed database platform with zero/minimum downtime along with evaluation of changes needed for CBS database with auxiliary databases in CBS ecosystem.	
5	To provide assistance in identifying the most suitable hardware solutions from the various offerings available in the market for CBS with no vendor lock-in or minimal dependency on single-vendor components.	
6	To provide guidance and technical know-how for smooth conduct of the POCs and ensure minimal/zero downtime for cross-platform Application, Database migration.	
7	Consultant will assist in taking the Ideal path for platform Migration at App as well as DB layer.	
8	Assisting in the preparation of the RFP document for the hardware refresh project.	
9	Providing technical guidance throughout the RFP process, including evaluation of vendor proposals.	
10	Ensuring that the proposed hardware solutions align with the bank's long-term business goals of 10-15 years and regulatory compliance requirements	
11	Overall engagement till completion of Application and Database migration including post migration audit.	
12	Facilitate in vendor selection who can carry out a benchmarking exercise to evaluate system performance and compatibility with CBS environment.	
13	To ensure a comprehensive Assessment of the supporting infrastructure landscape including Dev/Ops/TechOps. Assess All CBS deployment environments across the bank including Non-Prod (DEV, UAT, Pre-Prod) and Production environments across DCs	
14	To ensure necessary Software and Hardware licenses required for CBS are in place in new platform.	
15	To ensure evaluation of the solution for Primary Site (PR)/Near Site (NR)/ Disaster Recovery (DR)/Near Disaster Recovery Site (NDR) and Simulation/Benchmarking Site equivalent to production size. Also include the replication strategies with clearly defined Recovery Time Objectives (RTO)/Recovery Point Objectives (RPO) including Fully Automated Switchover/Switchback capabilities.	
16	Ensure inclusion of robust Backup policy and data retention policy in line with regulatory framework.	
17	Assist in ensuring the Report environments of CBS also get covered in the Benchmarking exercise and be the integral part of all CBS sites.	

18	Support BOM certification, PMO activities, and provide oversight during project implementation and post migration.	
19	Validate Technical and Functional requirement, Integration touchpoints, oversees Testing phases including SIT, UAT, Performance testing, Mock migration validation and BCP DR Drills.	
20	Review CBS performance, regulatory and compliance adherence, operational documents, user manuals, access controls etc for completeness and accuracy, system performance, SLA compliance, post go-live. Also recommend a full-fledged monitoring solution of the entire CBS application & infra with end-to-end visibility, pro-active alerting, predictive analytics etc so as to reduce downtime, early detection of issues and to ensure optimal performance.	

**Annexure-1**

**Technical Evaluation Criteria**

**SUBJECT: REQUEST FOR EXPRESSION OF INTEREST FOR ENGAGEMENT  
OF A TECHNICAL CONSULTANT FOR CORE BANKING SOLUTION  
(CBS)PLATFORM MIGRATION**

**Ref: SBI/GITC/Core Banking-Tech Operation/2025/2026/51 Dated: 30/07/2025**

**Consolidated Score for Relative Technical Evaluation (RTE)**

<b>Sl. No.</b>	<b>Particulars</b>	<b>Max Marks</b>	<b>Bidder's reply with Supporting documents</b>
<b>1</b>	Bidder's Capabilities, Past Experiences, Technical & Delivery Excellence (Parameters defined to evaluate Functional, Technical and Delivery Aspects) & Team Profile as per Annexure-1(A)	100	
<b>Total Marks</b>		100	

Maximum Technical score is 100 (Annexure – 1(A).

Minimum marks to be obtained by the bidder for qualification is 70.

**Name & Signature of authorised signatory**

**Seal of Company**

**Annexure 1 (A)**  
**Bidder's Capabilities, Past Experiences & Team Profile**

Sl No	Parameters	Indicative Criteria	Documents to be submitted for Evaluation	Maximum Marks										
1	<b>Experience of the company / firm:</b> Experience of handling Core Technical Transformation of core processes related consulting services in the BFSI Sector in India	<p>Experience of handling similar assignments in last 10 years in the BFSI Sector in India.</p> <p><b>CBS Platform Migration/Core Technical Revamp Projects (Maximum Marks :10)</b></p> <table><tr><th>Criteria</th><th>Marks</th></tr><tr><td>(a) Experience in 5 or more such projects</td><td>10 Marks</td></tr><tr><td>(b) Experience in 3 or more such projects</td><td>7 Marks</td></tr><tr><td>(c) Experience in 2 or more such projects</td><td>5 Marks</td></tr><tr><td>(d)Experience of 1 such projects</td><td>2 Marks</td></tr></table>	Criteria	Marks	(a) Experience in 5 or more such projects	10 Marks	(b) Experience in 3 or more such projects	7 Marks	(c) Experience in 2 or more such projects	5 Marks	(d)Experience of 1 such projects	2 Marks	Bidder should specifically confirm on their letter head in this regard and submit documentary evidence such as Purchase order/Certificate of completion of the work/ User acceptance report/Sign off report/CA certificate etc. of the clients and projects.	<b>Maximum Marks :10</b>
Criteria	Marks													
(a) Experience in 5 or more such projects	10 Marks													
(b) Experience in 3 or more such projects	7 Marks													
(c) Experience in 2 or more such projects	5 Marks													
(d)Experience of 1 such projects	2 Marks													

2	<b>Experience of the company / firm:</b> Experience of handling Core Technical Transformation of core processes related consulting services in the BFSI Sector Globally	Experience of handling similar assignments in last 10 years in the BFSI Sector Globally.  <b>CBS Platform Migration/Core Technical Revamp Projects (Maximum Marks :05)</b> <table><tr><td>Global experience of CBS Platform Migration/ Core Technical Revamp projects</td><td><b>Parameter</b></td><td><b>Marks</b></td></tr><tr><td></td><td>Yes</td><td>5 marks</td></tr><tr><td></td><td>No</td><td>0 marks</td></tr></table>	Global experience of CBS Platform Migration/ Core Technical Revamp projects	<b>Parameter</b>	<b>Marks</b>		Yes	5 marks		No	0 marks	Bidder should specifically confirm on their letter head in this regard and submit documentary evidence such as Purchase order/Certificate of completion of the work/ User acceptance report/Sign off report/CA certificate etc. of the clients and projects.	<b>Maximum Marks :05</b>	
Global experience of CBS Platform Migration/ Core Technical Revamp projects	<b>Parameter</b>	<b>Marks</b>												
	Yes	5 marks												
	No	0 marks												
3	<b>Experience &amp; Capability</b>	Experience and demonstrated capability in having handled banking related consulting projects in BFSI sector in India/Globally.  <b>CBS Platform Migration/ Core Technical Revamp Projects (Maximum Marks :20)</b> Number of CBS Platform Migration/ Core Technical Revamp Projects in BFSI Sector (Each project with a minimum value of Rs 5 Crore per project) undertaken during the last 10 years <table><tr><td><b>Criteria</b></td><td><b>Marks</b></td></tr><tr><td>(a) Experience in 5 or more such projects</td><td>20 Marks</td></tr><tr><td>(b) Experience in 3 or more such projects</td><td>15 Marks</td></tr><tr><td>(c) Experience in 2 or more such projects</td><td>10 Marks</td></tr><tr><td>(d) Experience of 1 such projects</td><td>5 Marks</td></tr></table>	<b>Criteria</b>	<b>Marks</b>	(a) Experience in 5 or more such projects	20 Marks	(b) Experience in 3 or more such projects	15 Marks	(c) Experience in 2 or more such projects	10 Marks	(d) Experience of 1 such projects	5 Marks	Bidder should specifically confirm on their letter head in this regard and submit documentary evidence such as Purchase order/Certificate of completion of the work/ User acceptance report/Sign off report/CA certificate etc. of the clients and projects.	<b>Maximum Marks :20</b>
<b>Criteria</b>	<b>Marks</b>													
(a) Experience in 5 or more such projects	20 Marks													
(b) Experience in 3 or more such projects	15 Marks													
(c) Experience in 2 or more such projects	10 Marks													
(d) Experience of 1 such projects	5 Marks													



4	Experience of Platform Migration for TCS BaNCS as the Core Banking Solution for any entity in BFSI	<table><tr><td rowspan="3">Experience of Platform Migration for TCS BaNCS as the Core Banking Solutions</td><td>Parameter</td><td>Marks</td></tr><tr><td>Yes</td><td>5 marks</td></tr><tr><td>No</td><td>0 marks</td></tr></table>	Experience of Platform Migration for TCS BaNCS as the Core Banking Solutions	Parameter	Marks	Yes	5 marks	No	0 marks	Bidder should specifically confirm on their letter head in this regard and submit documentary evidence such as Purchase order/Certificate of completion of the work/ User acceptance report/Sign off report/CA certificate etc. of the clients and projects.	Maximum Marks :05					
Experience of Platform Migration for TCS BaNCS as the Core Banking Solutions	Parameter	Marks														
	Yes	5 marks														
	No	0 marks														
5	Experience of having engagements with any entity in BFSI sector having <b>Balance Sheet size of INR 5 Lakh crore</b> for Consultancy projects during the last 10 years	<p>Management Consulting assignments with any entity in BFSI Sector having Balance Sheet size of INR 5 Lakh crore during past 10 years.</p> <p>Supported by feedback on quality of services from the user department.</p> <table><tr><td>Criteria</td><td>Marks</td></tr><tr><td>(a) Engagement with any BFSI entity in 4 (four) or more than 4 Consultancy assignments:</td><td>10 Marks</td></tr><tr><td>(b) Engagement with any BFSI entity in 3 (three) Consultancy assignments</td><td>7 Marks</td></tr><tr><td>(c) Engagement with any BFSI entity in 2 (two) Consultancy assignments</td><td>5 Marks</td></tr><tr><td>(d) Engagement with any BFSI entity in 1 (one) Consultancy assignment</td><td>2 Marks</td></tr><tr><td>(e) No such engagement</td><td>Nil</td></tr></table>	Criteria	Marks	(a) Engagement with any BFSI entity in 4 (four) or more than 4 Consultancy assignments:	10 Marks	(b) Engagement with any BFSI entity in 3 (three) Consultancy assignments	7 Marks	(c) Engagement with any BFSI entity in 2 (two) Consultancy assignments	5 Marks	(d) Engagement with any BFSI entity in 1 (one) Consultancy assignment	2 Marks	(e) No such engagement	Nil	Bidder should specifically confirm on their letter head in this regard and submit documentary evidence such as Purchase order/Certificate of completion of the work/ User acceptance report/Sign off report/CA certificate etc. of the clients and projects.	Maximum Marks :10
Criteria	Marks															
(a) Engagement with any BFSI entity in 4 (four) or more than 4 Consultancy assignments:	10 Marks															
(b) Engagement with any BFSI entity in 3 (three) Consultancy assignments	7 Marks															
(c) Engagement with any BFSI entity in 2 (two) Consultancy assignments	5 Marks															
(d) Engagement with any BFSI entity in 1 (one) Consultancy assignment	2 Marks															
(e) No such engagement	Nil															

6	Quality of Team Leader (PMO Leader and Technical leader) proposed to be assigned to this project – Names/ experience /CV.	<p>As per experience /capabilities shown in CV, suitability and relevant experience of Project Manager &amp; other resources proposed to be exclusively &amp; mandatorily engaged onsite for handling of the project.</p> <p><b>Manpower shall be evaluated separately on Quality of Technical Manpower &amp; Business manpower</b></p> <p>(Scoring will be based on quality &amp; suitability of exclusive resources, including their qualification, relevant experience and prior consulting assignments with SBI.)</p> <p>Weightage will also be given to relevant experience in Global/ Indian BFSI Sector</p> <table><tr><th>Criteria</th><th>Parameter</th><th>Marks</th></tr><tr><td rowspan="4">(a) Quality of <b>PMO Lead</b> in terms of experience</td><td>15 yrs &amp; Above</td><td>5 Marks</td></tr><tr><td>10-14 yrs</td><td>3 Marks</td></tr><tr><td>7-10 yrs</td><td>2 Marks</td></tr><tr><td>Less than 7 yrs</td><td>0 Marks</td></tr><tr><td rowspan="4">(b) Quality of <b>Technical Lead</b> in terms of experience</td><td>15 yrs &amp; Above</td><td>5 Marks</td></tr><tr><td>10-14 yrs</td><td>3 Marks</td></tr><tr><td>7-10 yrs</td><td>2 Marks</td></tr><tr><td>Less than 7 yrs</td><td>0 Marks</td></tr><tr><td rowspan="2">(c) Global Experience of <b>PMO Lead</b></td><td>1 yr or more</td><td>3 Marks</td></tr><tr><td>Less than 1 yr</td><td>0 Marks</td></tr><tr><td>(d) Global Experience</td><td>1 yr or more</td><td>3 Marks</td></tr></table>	Criteria	Parameter	Marks	(a) Quality of <b>PMO Lead</b> in terms of experience	15 yrs & Above	5 Marks	10-14 yrs	3 Marks	7-10 yrs	2 Marks	Less than 7 yrs	0 Marks	(b) Quality of <b>Technical Lead</b> in terms of experience	15 yrs & Above	5 Marks	10-14 yrs	3 Marks	7-10 yrs	2 Marks	Less than 7 yrs	0 Marks	(c) Global Experience of <b>PMO Lead</b>	1 yr or more	3 Marks	Less than 1 yr	0 Marks	(d) Global Experience	1 yr or more	3 Marks	<p>1) For evaluation of Quality Manpower: Bidder should specifically provide on their letter head details of all the manpower proposed to deployed along with their credential. CV of all the resources to be submitted.</p> <p>2) For evaluation of Global Support to be made available from global experts- Bidder should specifically provide on their letter head details of all the global experts proposed to deployed along with their credentials and CV.</p>	<b>Maximum Marks: 20</b>
Criteria	Parameter	Marks																															
(a) Quality of <b>PMO Lead</b> in terms of experience	15 yrs & Above	5 Marks																															
	10-14 yrs	3 Marks																															
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(c) Global Experience of <b>PMO Lead</b>	1 yr or more	3 Marks																															
	Less than 1 yr	0 Marks																															
(d) Global Experience	1 yr or more	3 Marks																															

		of <b>Technical Lead</b>	Less than 1 yr	0 Marks		
		(e) Global Support to be made available from global experts- Core Technical Transformation <b>PMO Lead</b>	Yes	2 marks		
			No	0 marks		
		(f) Global Support to be made available from global experts- Core Technical Transformation <b>Technical Lead</b>	Yes	2 marks		
			No	0 marks		
7	Understanding of SOW and technical transformation, Approach & Work-plan. (Completeness, robustness of approach, quality of ideas / solutions proposed to address Bank's requirements, project planning, resources planning, effort estimate list of deliverables etc., with milestones	<b>Approach, Methodology and Work-plan</b> Completeness & robustness of approach and methodology demonstrated in the response to the EOI, outline of Activities/tasks/initiatives / project planning with milestones and time frame for completion of different activities. Approach towards new technical architecture and migration plan to new architecture. Quality of understanding of the scope of the engagement demonstrated in the response to the EOI. Presentation by proposed Project Leader for Current Project to show case the understanding and relevant capabilities.  <b>Based on Presentation</b> <b>(Total time for presentation should not cross 90 minutes)</b>			Evaluation to be based on Presentation to be made by the bidder.	<b>Maximum Marks :30</b>

	and time frame for completion of different activity.			
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**Note:**

1. Documentary/Certification proofs from clients are to be enclosed to substantiate the claims made.
2. Team Composition, resource count, resource qualification details will be outlined in the Request for Proposal (RFP).
3. The proposed team shall be composed of experts and specialists (the “Professional Personnel”) in their respective areas of expertise and managerial/support staff (the “Support Personnel”) such that the Consultant should be able to complete the Consultancy within the specified time schedule. The Key Personnel shall be included in the proposed team of Professional Personnel. Other competent and experienced Professional Personnel in the relevant areas of expertise must be added as required for successful completion of this Consultancy. The CV of each such Professional Personnel, if any, should also be submitted.
4. The Bank will examine the CVs of all other Professional Personnel and those not found suitable shall be replaced by the Applicant to the satisfaction of the Bank.
5. Resource persons mentioned by the bidder at the time of technical evaluation must be on-boarded & deployed in the Project, without any deviation. Any change in the proposed team of resources should be done in unavoidable circumstances only and after obtaining necessary approval from the Bank.

**Appendix-D**

**Bidder Details**

Details of the Bidder

S. No.	Particulars	Details
1.	Name	
2.	Date of Incorporation and / or commencement of business	
3.	Certificate of incorporation	
4.	Brief description of the Bidder including details of its main line of business	
5.	Company website URL	
6.	Company Pan Number	
7.	Company GSTIN Number	
8.	Particulars of the Authorized Signatory of the Bidder a) Name b) Designation c) Address d) Phone Number (Landline) e) Mobile Number f) Fax Number g) Email Address	

**Name & Signature of authorised signatory**

**Seal of Company**

**Appendix-E**

**Pre-Bid Query Format**  
**(To be provide strictly in Excel format)**

Vendor Name	Sl. No	EOI Page No	EOI Clause No.	Existing Clause	Query/Suggestions

**Appendix-F**

**Format for Submission of Client References**

**To whosoever it may concern**

Particulars	Details
<b>Client Information</b>	
Client Name	
Client address	
Name of the contact person and designation	
Phone number of the contact person	
E-mail address of the contact person	
<b>Project Details</b>	
Name of the Project	
Start Date	
End Date	
Current Status (In Progress / Completed)	
<b>Size of Project</b>	
Value of Work Order (In Lakh) (only single work order)	

**Appendix-G**

**Certificate of Local Content**

<Certificate from the statutory auditor or cost auditor of the company (in case of companies) or from a practicing cost accountant or practicing chartered accountant (in respect of suppliers other than companies) giving the percentage of local content, on their letter head with Registration Number with seal.>

Date:

To,

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Dear Sir,

**Ref.: SBI/GITC/Core Banking-Tech Operation/2025/2026/51 Dated: 30/07/2025**

This is to certify that proposed \_\_\_\_\_ <details of services> is having the local content of \_\_\_\_\_ % as defined in the above mentioned RFP.

2. This certificate is submitted in reference to the Public Procurement (Preference to Make in India), Order 2017 including revision thereto.

**Signature of Statutory Auditor/Cost Auditor**  
**Registration Number:**  
**Seal**

**Counter-signed:**

**Bidder**

**OEM**

< Certified copy of board resolution for appointment of statutory/cost auditor should also be enclosed with the certificate of local content.>

**OR**



**Format for Self-Certification of Local Content**

Date:

To,

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Dear Sir,

**Ref.: SBI/GITC/Core Banking-Tech Operation/2025/2026/51 Dated: 30/07/2025**

This is to certify that proposed \_\_\_\_\_ < details of services > is having the local content of \_\_\_\_\_ % as defined in the above mentioned RFP.

1. The details of location(s) at which the local value addition is made are as under:

Sl No	Product details	Name of place
1		
2		

3. This certificate is submitted in reference to the Public Procurement (Preference to Make in India), Order 2017 including revision thereto.

**Signature of authorised official**

**Name:**

**Company seal:**