



**REQUEST FOR EXPRESSION OF INTEREST  
FOR SHORTLISTING OF CONSULTANTS FOR PROCUREMENT OF  
LEARNING MANAGEMENT SYSTEM**

**Ref: SBI/STU/EOI/2023-24/2 DATED 17.06.2023**

**Name and Address of Procuring Office:**

**Deputy General Manager (L&D)  
Strategic Training Unit,  
State Bank of India, Corporate Centre  
State Bank Bhawan,  
Madame Cama Road, Nariman Point,  
Mumbai - 400021**

**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)	Name: Mr. Ejaz Ahmad Designation: Deputy General Manager (L & D) Email ID: <a href="mailto:dgmel.stu@sbi.co.in">dgmel.stu@sbi.co.in</a> Contact Address: Deputy General Manager (Learning & Development) State Bank of India Strategic Training Unit, Corporate Centre, 16 <sup>th</sup> Floor, State Bank Bhawan, Madame Cama Road, Mumbai - 400021 Contact Number: 022-22742040 (Office)
2	Bid Document Availability including changes/amendments, if any to be issued	EOI may be downloaded from Bank's website <a href="https://www.sbi.co.in">https://www.sbi.co.in</a> under procurement news and e-procurement agency portal <a href="https://etender.sbi/SBI/">https://etender.sbi/SBI/</a> from 17.06.2023 to 07.07.2023
3	Last date for requesting clarification	Upto 5:00 PM (time) on 23.06.2023 (date) All communications regarding points / queries requiring clarifications shall be given in writing or by e-mail.
4	Pre - bid Meeting at (venue)	From 3:00 PM (time) to 5:00 PM (time) on 26.06.2023 (date) through online meeting
5	Clarifications to queries raised at pre-bid meeting will be provided by the Bank.	On 29.06.2023 (date)
6	Last date and time for Bid submission	Upto 5:00 PM (time) on 07.07.2023 (date)
7	Address for submission of Bids	M/s E-Procurement Technologies Ltd, Website: <a href="https://etender.sbi/SBI/">https://etender.sbi/SBI/</a>
8	Date and Time of opening of Technical Bids	5:30 PM (time) on 07.07.2023 (date) 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. 5,000.00

		Amount should be deposited in A/c No: 10768099503  IFSC:_ SBIN0008586  Account Name:_ MS SBI CENTRAL OFFICE, OMD A/C —  Tender fee will be non-refundable.
12	Contact details of e-Procurement agency appointed for e-procurement	M/s E-Procurement Technologies Ltd, Website: <a href="https://etender.sbi/SBI/">https://etender.sbi/SBI/</a> Contact number:- 9510812971,951012960, 9081000427 Email id:-etender.support@sbi.co.in
13	Presentation by eligible bidders	Dates for presentation by eligible bidders shall be advised by the Bank.

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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 EOI is issued by **the Bank** on behalf of **SBG** for shortlisting of consultant for procurement of Learning Management System.
- ii. 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.
- iii. 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.
- iv. Address for submission of online Bids, contact details including email address for sending communications are given in Schedule of Events of this EOI.
- v. 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.
- vii. This EOI document shall not be transferred, reproduced or otherwise used for purpose other than for which it is specifically issued.
- viii. 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:

- Upskilling and reskilling of employees on an ongoing basis is one of the most important factors in any company’s success in today’s fast changing world, as it

is essential for all organizations to keep abreast with new developments in the ecosystem in which they are operating and to anticipate and plan for the changes expected in future. A skilled employee base allows the organization to compete in the sector and to develop better products and services for its customers.

- The Bank has always given utmost importance to the learning and development of its employees and has created a significant training infrastructure to this effect. Apart from the physical trainings at the Bank's training institutes spread across the country, the Bank has also developed many in-house online learning applications and resources for facilitating anytime learning requirements of its employees.
- A need has been felt now to integrate the diverse online learning resources, applications and training management application through a centralized Learning Management System (LMS). The LMS is expected to provide a comprehensive training management system to manage the learning & development of Bank's employees through different training modes and to provide an enhanced learning experience to the employees.
- The Bank proposes to engage a consultant for assisting in selection of a vendor for procurement, customization and implementation of Learning Management System (LMS) in the Bank.
- The consultant will study the existing training infrastructure of the Bank, hold consultations with the different user departments and assist in designing the framework of requirements from the Learning Management System and prepare the scope of work for the RFP proposed for procurement of Learning Management System. The consultant will also oversee the implementation of the Learning Management System in the Bank.

### 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”** 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.

**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 **for shortlisting of consultants for procurement and implementation of Learning Management System** in response to the EOI No. SBI/STU/EOI/2023-24/02 **dated** 17.06.2023. 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.
- (h) All the enclosures (Bid submission) shall be serially numbered.
- (i) The Bank reserves the right to reject Bids not conforming to above.

**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. Guidelines on Public Procurement (Preference to Make in India), Order 2017 (PPP-MII Order) and any revision thereto will also be applicable to the RFP.
- 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 empaneled 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. 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.

**19. 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**

**BID FORM (TECHNICAL BID)**

[On Bidder's letter head]

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

To:

Deputy General Manager (Learning & Development)

State Bank of India

Strategic Training Unit, Corporate Centre,

16<sup>th</sup> Floor, State Bank Bhawan,

Madame Cama Road, Mumbai - 400021

Dear Sir,

**Ref: EOI No. SBI/STU/EOI/2023-24/02 DATED 17.06.2023**

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. We also certify that we have not been disqualified / debarred / terminated on account of poor or unsatisfactory performance and/or blacklisted by any Scheduled Commercial Bank / Public Sector Undertaking / State or Central Government or their Agencies / Departments at any time, during the last 3 years.

- 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 are not from such a country or if from a country, has been registered with competent authority. We certify that we 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 registered under applicable Act 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 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.25.00 crore during last 03 (three) financial year(s) i.e. FY2019-20, FY2020-21 and FY2021-22.		Copy of the audited financial statement for required financial years. (Certificate from statutory auditor for preceding/ 3 financial years 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 point 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 in providing the LMS related consultancy services to at least two companies/organizations in India as on 31.03.2023.		Copy of the order and / or Certificate of completion of the work.

6.	Client references and contact details (email/ landline/ mobile) of customers for whom the Bidder has executed similar projects in India. (Start and End Date of the Project to be mentioned) in the past		Bidder should specifically confirm on their letter head in this regard as per <b>Appendix-F</b>
7.	Bidder should have experience and demonstrated capability in providing LMS related consultancy services in India as specified in this EOI to at least <b>one</b> company/organization with Asset Base of more than Rs. <b>1 Lakh Crores</b> as on 31.03.2022, during the last 5 FY.		Copy of the Valid Certificate(s) to be provided including work order, invoice, certificate of completion and financial statements (if financial statements not available in public domain)
8.	Bidder should have experience and demonstrated capability in providing LMS related consultancy services in India as specified in this EOI to at least <b>one</b> company/organization with employee strength of atleast 15000, during the last 5 FY, as on 31.03.2022.		Copy of the Valid Certificate(s) to be provided including work order, invoice, certificate of completion, etc.
89.	Past/present litigations, disputes, if any (Adverse litigations could result in disqualification, at the sole discretion of the Bank)		Brief details of litigations, disputes related to product/services being procured under this EOI or infringement of any third party Intellectual Property Rights by prospective Bidder/OEM or disputes among Bidder's Board of Directors, liquidation, bankruptcy, insolvency cases or cases for debarment/blacklisting for breach of contract/fraud/corrupt practices by any Scheduled Commercial Bank/Public Sector Undertaking/ State or Central Government or their Agencies/Departments or any such similar cases, if any, are to be provided on Company's letterhead. In case of no such litigation, a self-declaration to be

			provided on Company's letterhead.
10.	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 and also certify that they have not been disqualified / debarred / terminated on account of poor or unsatisfactory performance and/or blacklisted by any Scheduled Commercial Bank / Public Sector Undertaking / State or Central Government or their Agencies / Departments at any time, during the last 3 years..		Bidder should specifically certify in <b>Appendix A</b> in this regard.
11	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.
12.	Bidder should have statutory registration(s) with Tax and other compliance authorities		A copy of PAN/ TAN/ GST Registration No. (whichever applicable) in the name of 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.

The EOI is for shortlisting of consultant and not the LMS vendor. It is clarified that there needs to be arm's length distance between consultant and LMS vendor and both can not be same / associates / subsidiary.

**Eligibility criteria mentioned at Sl No 3 to 5 and 7 to 8 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 EOI terms and conditions and who are having Start-up company status, can claim exemption for eligibility criteria mentioned at SI No 3 to 5 and 7 to 8 in table above.
  - 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.
  - iv. The startups need to submit the documents for their turnover and experience in LMS related consultancy since inception for Bank's record, although these will not be considered for qualification or technical scores.

**Name & Signature of authorized signatory**

**Seal of Company**

**Technical Criteria/Scope of Work**

*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 post EOI*

The consultant has to provide services for procurement of Learning Management System.

**Support in reviewing/defining the scope of work and conditions for selection of a vendor for providing Learning Management System.**

- The consultant will be required to understand, review and assist in defining the requirements of the Bank in a Learning Management System to be acquired for all employees of the Bank.
- The consultant will be required to coordinate with the different stakeholder departments of the Bank with stake in the input/output and implementation of the LMS, while defining the requirements of the LMS.
- The consultant will be required to assist in the preparation of the scope of work and conditions of the RFP to be issued for selection of the vendor for procuring, customizing and implementing the LMS.
- The detailed framing of the specifications of the LMS will have to be undertaken by the consultant, after considering the requirements as well as the technical specifications and information security regulations of the Bank.
- The consultant will be required to understand and frame the different inputs in to the LMS that will be required from different departments of the Bank and shall need to coordinate with the different stakeholders in the Bank for devising a seamless process flow for desired output/results.
- The consultant will also support in designing the reporting requirements from the LMS.
- The consultant will be required to assist in the technical evaluation of the bidders for the RFP for LMS vendor selection.

**Support in implementation of the LMS in the Bank.**

- Consequent upon selection of a vendor through RFP process for procuring the LMS, the consultant will be required to provide initial support in the implementation of the LMS in the Bank.
- The consultant will coordinate with the selected vendor and the Bank's IT Team including information security clearance from concerned department for supporting the seamless implementation of the LMS solution, including the data flow into the solution and the reports derived from the solution.
- The consultant will be required to support pilot rollout, if needed, in select geographies and monitoring of the performance of LMS solution for a period of 3 months post full implementation and will be required to submit review of the performance of the solution to Bank's management at periodic intervals during this period.

Project Timeline: The Bank has set a target of 5-6 months for implementation of Learning Management System (including migration of historical training data and existing e-learning content). The proposed Learning Management System has to cater to the learning requirements of the Bank for implementing its vision for the next 5 years.

A brief list of some of the key deliverables and scope of work from the Learning Management System is appended. As the list is an indicative one and not exhaustive, the consultant is expected to do their own analysis and provide the appropriate recommendations and

suggestions after evaluating the existing pain points in the training infrastructure and market research on Learning Management.

- i. Capturing of training needs of the employees
- ii. Personalized learning pathways for employees based on performance (PMS), role, grade, past experience, etc.
- iii. 360-degree view of the different trainings by an employee
- iv. Platform for integrating the different learning offerings from existing internal sources and proposed from external institutes/vendors
- v. Migration of historical training data
- vi. Migration of existing e-learning content
- vii. Training Management System for Bank's Training Centres including training calendar, examinations, hostel/library management
- viii. E-Learning portal
- ix. Employee engagement surveys
- x. AI/ML based enhanced learning experience
- xi. Measurement of training efficacy

**Name & Signature of authorised signatory**

**Seal of Company**

**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**

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

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

**Format for Submission of Client References**

**To whosoever it may concern**

<b>Particulars</b>	<b>Details</b>
<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)	

**Technical Evaluation Criteria**

No.	Particulars	Criteria	Marks	Max. Marks
1	Experience and demonstrated capability in having executed/completed LMS related consulting projects, in India, as on 31.03.2022 *	More than 5 projects in last 5 FY	20	20
		3 to 5 projects in last 5 FY	15	
		2 projects in last 5 FY	10	
2	Experience in providing LMS consultancy services to at least <b>one</b> company/organization in India during the last 5 FY with Asset Base of more than Rs. <b>1</b> Lakh Crores as on 31.03.2022. *	As mentioned alongside with Asset base of more than or equal to Rs. 2 Lakh Cr	15	15
		As mentioned alongside with Asset base of more than Rs. 1.5 Lakh Cr and less than Rs. 2 Lakh Cr	10	
		As mentioned alongside with Asset base of Rs. 1 Lakh Cr and less than Rs. 1.5 Lakh Cr	5	
3	Experience in providing LMS consultancy services to at least <b>one</b> company/organization in India during the last 5 FY as on 31.03.2022. *	As mentioned alongside with employee strength of more than 50000	10	10
		As mentioned alongside with employee strength of 25000 to less than 50000	8	
		As mentioned alongside with employee strength of 15000 to less than 25000	5	
4	The bidder must have a team of professionals who are domain experts in providing consultancy services.  The assessment will be based on the list of professionals offered (minimum 3 full time members) by the bidder, their qualifications and experience submitted with the bid and as per the capabilities shown in CV of Project Manager & Team and key resources assigned for handling the project			25
5	<b>Quality of understanding of the scope of the engagement demonstrated</b> in the responseto the EOI.  <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.  <b>Based on Documents - Part II - Appendix/Annexures/ Exhibits and presentation</b>	30
	<b>Total</b>	<b>100</b>

\* Consultancy project specifically on LMS or where LMS formed a part of the overall project.

The evaluation criteria at Sr. No. 1 to 3 shall be normalized for Startup / MSME company subject to qualifying in criteria at Sr. No. 4 and 5.

Documentary evidence must be furnished wherever applicable, 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**.