



**REQUEST FOR EXPRESSION OF INTEREST (EOI)
FOR SHORTLISTING OF CONSULTANCY SERVICES
FOR TRANSFORMATION
OF
STATE BANK INSTITUTE OF LEADERSHIP (SBIL)
INTO WORLD CLASS EXECUTIVE LEARNING HUB FOR BFSI SECTOR**

Ref: SBI/SBIL/EOI/2026-27/05 Dated 17.08.2026

**STATE BANK INSTITUTE OF LEADERSHIP
PLOT NO. II F/2, STREET NO. 329
ACTION AREA III, NEWTOWN
KOLKATA-700160**

SCHEDULE OF EVENTS

S. No.	Particulars	Remarks
1	Contact details of issuing department (Name, Designation, Mobile Number, Email and Office address for sending any kind of correspondence regarding this EOI)	Name: Shri Surojeet Chatterjee Designation: Deputy General Manager (Admin & Accounts) Email ID: dgmadmin.sbil@sbi.co.in Contact Address: State Bank Institute of Leadership, Plot II F/2, Street no. 329, Action Area III, Newtown, Rajarhat, Kolkata-700160 Contact Number: 9674712215 Name: Shri Roohullah Badruddin Designation: Assistant General Manager (Admin & Hospitality) Email ID: agmadmin.sbil@sbi.co.in Contact Address: State Bank Institute of Leadership, Plot II F/2, Street no. 329, Action Area III, Newtown, Rajarhat, Kolkata-700160 Mobile: +91-7596809057
2	EOI Document Availability including changes/amendments if any to be issued	EOI may be downloaded from Bank's website https://www.sbi.bank.in/sbi-in-the-news/procurement-news as well as https://www.tenderwizard.com/SBIETENDER
3	Last date for requesting clarification	Up to 03.00 PM on 24.08.2026 All communications regarding points / queries requiring clarifications shall be given in writing or by e-mail. Pre-bid queries should be submitted as per format available in Appendix-E. Bidders need to send pre-bid queries to the mail ID: dgmadmin.sbil@sbi.co.in

4	Pre-bid Meeting at State Bank Institute of Leadership	From 11:00 AM to 05:00 PM on 25.08.2026 on 2nd Floor, Ashoka Bhawan, State Bank Institute of Leadership, Newtown Kolkata, or in online mode on MS teams. Those who are interested in participating in the pre-bid meeting should share the participants (maximum 2 per bidder) details to email id: dgmadmin.sbil@sbi.co.in The meeting link will be shared with the participants in the event of online meeting.
5	Clarifications to pre-bid queries raised will be provided by the Bank on	Website & E-tender portal
6	Last date and time for EOI submission	Up to 5pm on 08.09.2026 (Hard copy of the documents submitted online to be delivered to the office of State Bank Institute of Leadership by 2 pm on 09.09.2026. The documents will be considered only if the same have been submitted online.)
7	Address for submission of EOI	URL: https://www.tenderwizard.com/SBIETENDER Name of the e-Procurement Agency: Antares Systems Limited Office Address: State Bank Institute of Leadership Plot No. II F/2, Street No. 329, Action Area III, Newtown, Kolkata - 700160
8	Date and time of opening of EOI	11:00 AM on 10.09.2026 Authorized representatives of Bidders may be present online during the opening of the Bids. However, Bids would be opened even in the absence of any or all of Bidders representatives.

9	Tender Fee	₹ 10,000/- (₹ Ten thousand only) Amount should be deposited in A/c No: 37243340083 IFSC: SBIN0016916 Account Name: State Bank Institute of Leadership, Kolkata Address: Newtown Kolkata Mode of transaction: Intra Bank transfer (SBI to SBI)/ NEFT. The tender fee will be non-refundable.
10	Contact details of e-Procurement agency appointed for e-procurement	Name: M/s Antares Systems Limited, Kolkata Contact person: Kushal Bose Mob: 9674758719, Email: kushal.b@antaressystem.com

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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 SBIL **for Shortlisting of Consultancy Services for Transformation** of its Apex Training Institute (ATI)- **State Bank Institute of Leadership** (herein after called-SBIL), situated in Kolkata **into World -Class Executive Learning Hub** in BFSI sector.
- ii. To meet the consultancy 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 consultancy 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. Unless otherwise specifically permitted in **Appendix-B**, a bidder may not use the credentials of the original/parent entity of the bidder from which it has been demerged and come into existence, to meet the turnover, profit, experience, or other eligibility criteria of 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.
- vi. This EOI document shall not be transferred, reproduced, or otherwise used for purposes 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:

State Bank of India, a Fortune 500 company, is an Indian Multinational, Public Sector Banking and Financial services statutory body headquartered in Mumbai. The rich heritage and legacy of over 200 years, accredits SBI as the most trusted Bank by Indians through generations.

We are the largest banking and financial services organization in India, with an asset base of over Rs. 61 trillion. We serve over 50 crore customers through our vast network of over 22,500 branches, 63,580 ATMs/ADWMs, 82,900 BC outlets, with an undeterred focus on innovation, and customer centricity, which stems from the core values of the Bank - Service, Transparency, Ethics, Politeness and Sustainability.

In the rapidly changing banking landscape, leadership development programmes played a vital role for senior leaders. With shifting customer expectations, evolved regulatory requirements, and rising competition, senior leaders required strategic vision, strong interpersonal capabilities, and resilience to motivate their teams effectively and manage complex stakeholder dynamics.

In this context, State Bank Institute of Leadership (SBIL) was established in 2016 as a "Centre of Excellence" to address the training and development needs of senior and top-level executives within our bank, as well as participants from public sector banks (PSBs) across India and several banks in neighbouring countries. The institute was established with the following objectives:

- Build an institute of global standards.
- Build an Institute of Excellence in Banking and Finance with high caliber action-based research and critical capacity building.
- Be a leader amongst the emerging countries for financial sector training.

However, as digital transformation accelerates and fintech disruptors increasingly influence the financial sector, it is essential for senior leaders to demonstrate both strategic foresight and agility to navigate continuous uncertainty and change. This growing complexity within the industry, combined with the evolving expectations of leadership, necessitates a more advanced, research-driven, and globally benchmarked learning experience. Therefore, there is a significant opportunity to establish SBIL as a **"World-Class Executive Learning Hub."** This initiative aims to serve top executives and thought leaders in the Banking, Financial Services, and Insurance (BFSI) sector across the Asia-Pacific region, while aligning with international best practices and fostering excellence in global leadership.

To achieve this end, the Bank proposes to engage a reputed management consultant having proven experience, capability and expertise in the areas specified to align the Bank's vision on SBIL.

The selected consultant will partner with SBIL to design and implement a comprehensive transformation roadmap to enhance SBIL's position as the **"World-Class Executive Learning Hub"**.

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. **"SBIL"** shall mean State Bank Institute of Leadership, an Apex Training Institute of State Bank of India, situated in Newtown, Kolkata
- iii. **"Bidder"** means an eligible entity/firm submitting the Bid in response to this EOI.
- iv. **"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 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 Bidder is permitted to submit only one Bid and multiple Bids by a Bidder shall be considered as non-responsive Bid and all such bids shall be summarily rejected.

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.
- 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 Consultancy Services for Transformation of SBIL into World-Class Executive Learning Hub for BFSI Sector** in response to the **EOI No. SBI/SBIL/EOI/2026-27/05 Dated 17.08.2026**. 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 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 **Sl. 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 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.
- (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 up to 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. 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, clarification and amendment 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 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 declarations or providing false information for participation in an 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 up to 12 (twelve) months. When a Bidder is on 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 EO/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 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/ proprietors/ 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 Kolkata.

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. 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. Wilful 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 advice. 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 circumstances 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

[On Bidder's letter head]

Date: _____

To:

The Deputy General Manager (Admin & Accounts),
State Bank Institute of Leadership
Plot no. II F/2, Street no. 329
Action Area III, Newtown
Kolkata 700160

Dear Sir,

Ref: EOI No. SBI/SBIL/EOI/2026-27/05 Dated 17.08.2026

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, organization 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. 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.
- 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 2026

(Signature)

(Name)

(In the capacity of)

Duly authorized 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 should 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 and amendment thereto.		Bidder should specifically certify in Appendix A in this regard and provide a copy of the registration certificate issued by competent authority wherever applicable.
3.	The Bidder must have an average turnover of a minimum of ₹ 50 crores during last 03 (three) financial year(s) i.e. FY 2023-24, 2024-25, and FY 2025-26		Copy of the audited financial statements for required financial years. (Certificate from statutory auditor for preceding/ current year may be submitted.) (As per Appendix G)
4.	The Bidder should be profitable organization on the basis of profit before tax (PBT) for at least 02 (two) out of the 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. (As per Appendix G)

5.	Bidder should have proven experience and demonstrated capability in providing consultancy services to the Financial Institutions / Public Sector Bank's/ Private Sector Bank's/ BFSI in India or outside in the field of Executive Education/Training institute or collage as indicated in the scope of work, during last five years (as on 30.06.2026) as below: I. With minimum average of 3500 participants [Executive Grade] trained in a year (during last 3 financial years, and II. Minimum Project duration of 6 months and III. Minimum experience of 5 years (as per scope of work)		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/Abroad. At least Three (03) client references are required. (Start and End dates of the past project to be mentioned)		Bidder should specifically confirm on their letterhead in this regard (As per Appendix-F)
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, related to services being procured under this EOI or infringement of any third party Intellectual Property Rights by prospective Bidder 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 letter head. (As per Appendix H)
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 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 Appendix A 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 Appendix A in this regard.
10.	Bidder should have statutory registration(s) with Tax and other compliance authorities.		A copy of PAN/ TAN/ GST Registration number (whichever is applicable) in the name of bidder.
11.	The Bidder's Organization should not be owned/ controlled by any Director (or Relatives) of State Bank of India, both present and those		A Self Declaration by the Bidder in Company's letter head.

	who have retired in the last one year.		
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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.

Name & Signature of Authorized Signatory

Seal of Company

APPENDIX-C

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 primary objective is to develop a forward-looking strategic blueprint and execution roadmap aimed at:

- Revitalizing SBIL's existing training architecture.
- Establishing four dedicated learning wings to cater to internal and external leadership development needs.
- Enhancing SBIL's institutional visibility, credibility, and market standing.
- Building SBIL's internal capability to sustain high-quality leadership development.
- Positioning SBIL as best in class Executive Learning Institution.

1: Creation and Operationalization of Dedicated L&D Wings

a-Internal Capacity building Wing	
i.	Conceptualize and design flagship programmes exclusively for the Bank's top executives.
ii.	Build structured leadership journeys incorporating competencies, assessments, and immersive learning methodologies
iii.	Facilitate knowledge partnerships and curated faculty pools for high-impact delivery
b-External and Open Programme Wing	
i.	Conduct a deep review of current external offerings and industry landscape
ii.	Design short-duration, high-impact programmes tailored for senior executives across the BFSI sector
iii.	Develop hybrid learning formats blending classroom, virtual, and experiential methodologies
iv.	Facilitate co-branding and co-delivery of SBIL with Leaders in Executive Education to align with BFSI industry standards and expectations
v.	Awarding certificates jointly issued with SBIL or facilitating the same with Reputed Institutions [Indian or Global]
c-Executive Learning Wing for Long-Duration, Customized Journeys	
i.	Conceptualize and co-develop long-duration, advanced leadership journeys targeted at succession-level and C-suite executives
ii.	Design/Develop or identify Assessment Tools for psychometric assessment of participants in Executive Grade
iii.	Plan and operationalize a full classroom wing dedicated to these programmes. Develop faculty pools (internal and external), including certification, observation, and continuous quality enhancement mechanisms

2: Strengthening the Institutional Presence of SBIL

i.	Designing and launching a modern, responsive SBIL website highlighting programmes, faculty, achievements, and thought leadership
ii.	Establishing an institutional presence across key social media platforms using a structured content and engagement strategy.
iii.	Enabling SBIL's participation in national and global seminars, industry events, and leadership conclaves
iv.	Curating and hosting panel discussions featuring eminent BFSI personalities
v.	Conducting workshops and seminars for CXO-level audiences on contemporary themes
vi.	Developing SBIL's thought leadership assets including whitepapers, research publications, videos, case studies, newsletters, and BFSI insights reports

3: Competency Framework Alignment

Strategic and Contextual Diagnostics	
i.	Review existing competency frameworks, role descriptions, leadership models, and skill matrices.
ii.	Study current training curriculum, leadership programmes, assessment tools and evaluation mechanism.
iii.	Examine alignment with Bank's strategic plan, succession planning and performance management systems.
iv.	Review regulatory, governance, and risk expectations applicable to BFSI roles
Identification of Future Critical Competencies	
i.	Conduct structured interviews and focus group discussions with: • Board level leaders/ Top Management • Business Heads/ Functional Heads • HR, Risk, IT, and Digital leaders
ii.	Capture leadership expectations and future capability needs
iii.	Benchmark against leading Indian and Global BFSI institutions, leadership academics, and corporate universities
iv.	Incorporate best practices from global frameworks
v.	Create a comprehensive competency framework document encompassing the following: • Core leadership competencies • Functional and Domain competencies • Future Competencies • Proficiency level definitions
vi.	Define initial and continuous certification requirements for Faculty
vii.	Align all competencies with SBIL learning architecture

4: Impact Measurement & ROI Assessment

Impact Assessment	
i.	Review current evaluation mechanisms, identify gaps, and prepare a Gap Assessment Report
ii.	Design a comprehensive Impact Measurement Framework covering: • Reaction & Experience • Learning Outcome • Behaviour/ Application • Business Impact • Strategic Value
ROI Assessment	
i.	Define direct and indirect cost including, interalia • Programme design and delivery cost • Faculty cost • Infrastructure cost
ii.	Define benefit quantification model(s) to quantify tangible and intangible benefits
iii.	Develop standardized ROI formulas and assumptions
iv.	Design standardized data collection tools including: • Pre and post programme assessments • Behavioural observation checklist • Manager feedback surveys • 360-degree feedback instruments
v.	Integrate impact measurement tool with LeMS platform
vi.	Design Analytics models to track trends, correlations, and impact over time
vii.	Design Dashboards/ Reports for Executive Reporting

5: Sustainability plan

i.	Develop a change management plan for SBIL; conduct orientation sessions for key roles
ii.	Design a knowledge creation model including Research, whitepapers, case studies, and BFSI insights
iii.	Establish ongoing faculty certification, calibration, and upskilling mechanisms
iv.	Develop SOPs, Manuals, and Governance handbooks
v.	Identify long-term partnerships with academic institutions, industry bodies, and think tanks
vi.	Identify new revenue streams (digital contents, research, etc.) and provide initial handholding support
vii.	Prepare road map for making SBIL self-sustainable in the long run and provide initial handholding support
viii.	Prepare a Board Level sustainability concept note

PROJECT TIMELINES

(As the brief overview of the scope of work provided in this EOI may be further elaborated, viz., more details may be included in the Request for Proposal (RFP) document to be issued post EOI, the indicative timeframe/ timelines provided in this EOI may be suitably adjusted/ changed in the RFP.)

The indicative **timeline for completion of the project is 12 months.**

Glossary of Abbreviations/Terms used in EOI

S No	Abbreviations /Terms	Definitions
1	SBI	State Bank of India
2	SBIL	State Bank Institute of Leadership
3	ATI	Apex Training Institute
4	BFSI	Banking Financial Services and Insurance
5	C&AG	Comptroller and Auditor General
6	CVC	Central Vigilance Commission
7	IT	Information Technology
8	ROI	Return on Investment
9	LeMS	Learning Management Solution
10	PTC	Post Training Connect
11	EMD	Earnest Money Deposit
12	EOI	Expression of Interest
13	SOP	Standard Operating Procedure
14	HR	Human Resources
15	IBA	Indian Banks' Association
16	RBI	Reserve Bank of India
17	RFP	Request for Proposal
18	MSE	Micro & Small Enterprises
19	RBI	Reserve Bank of India
20	RFP	Request for Proposal

APPENDIX-H

(On the letterhead of the Bidder duly stamped and signed)

**PAST/ PRESENT LITIGATIONS, DISPUTES, IF ANY PERTAINING TO THE
BIDDER (Refer S. No. 7 of Appendix-B)**

S. No.	Other party to Litigation	Case no. & Court	Status of bidder in Litigation (Applicant / Respondent)	Briefs of Litigation
1				
2				
3				
4				

Signature of Authorized Person:

Signed at _____ dated _____ by _____

Designation _____ for _____ Agency

Seal of Agency

APPENDIX-G

**[ON THE LETTER HEAD OF AUDITORS /CHARTERED ACCOUNTANTS]
CERTIFICATE**

TO WHOM SO EVER IT MAY CONCERN

This is to certify that M/s having its Registered Office at
..... had achieved the following level of Turnover/
/Profit Before Tax/ Net profit/ Net worth in respect for the financial years mentioned
hereunder:

(INR In Crores)

Particulars	2023-24	2024-25	2025-26
Turn over			
Profit Before Tax			
Net profit			
Net-worth			

The figures certified for the stated Financial Years are based on the Books of Account,
Audited Balance Sheet of the Company and the records produced before us.

Signatures of Auditors/Chartered Accountants

Name:

Seal

Place:

Date:

APPENDIX-F

FORMAT FOR SUBMISSION OF CLIENT REFERENCES

To whosoever it may concern

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

APPENDIX-E

PRE-BID QUERY FORMAT
(To be provided strictly in Excel format)

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

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 Authorized Signatory

Seal of Company