

Corrigendum-3 to GeM Bid ref. no GEM/2024/B/5449770 dated 30/09/2024 for Selection of Consultant for Providing Consultancy Services to augment the business in liability segment with primary focus on CASA deposits in Canara bank.

It is decided to amend the following in respect of the above RFP:

a. GeM bid document (Bid End date/ Bid Opening Date, Page no. 1 of 7):

Description	Existing details	Amended details
Bid End Date/Time	12/11/2024, 15:00:00	<u>13/11/2024, 15:00:00</u>
Bid opening Date/Time	12/11/2024, 15:30:00	<u>13/11/2024, 15:30:00</u>

Annexure-10 a. Technical Evaluation Criteria

Sl. No	Section/Annexure/Appendix of GeM Bid	Clause No.	Existing Clause	Amended Clause
1.	Annexure-10 Technical Evaluation Criteria	Entire Annexure	Existing Annexure-10 Technical Evaluation Criteria	Amended Annexure-10 Technical Evaluation Criteria

All the other instructions and terms & conditions of the above RFP shall remain unchanged.

Please take note of the above amendments while submitting your response to the subject RFP

Date: 06/11/2024

Place: Bengaluru


Deputy General Manager



Amended Annexure-10
Technical Evaluation Criteria

SUB: Selection of Consultant for providing consultancy services to augment the business in liability segment with primary focus on CASA deposits in Canara Bank.

Ref: GEM/2024/B/5449770 dated 30/09/2024.

Technical bids will be subjected to following evaluation process. The eligible bidders will be required to give a presentation to the bank for technical evaluation.

Sl. No.	Criteria Description	Rules for awarding points	Max. Points								
1.	<p>Expertise and Demonstrated Capability:</p> <p>The bidder must have experience in having executed/completed banking related consulting projects, with a minimum duration of 12 months with public sector Banks/public sector financial institutions/private sector banks in India <u>and foreign bank having branches</u> in India in last 5 years as on 31/03/2024. (i.e., 2019-20, 2020-21, 2021-22, 2022-23 and 2023-24).</p> <p>Document to be submitted:</p> <p>The bidder should submit relevant purchase order/work order / engagement letter along with reference letter / satisfactory letter/ completion certificate/ email confirmation from the client, duly mentioning the details of the services.</p>	<table border="1"> <tr> <td>8 or more projects in the last 5 years</td> <td>20</td> </tr> <tr> <td>5 to 7 projects in the last 5 years.</td> <td>15</td> </tr> <tr> <td>2 to 4 projects in the last 5 years.</td> <td>10</td> </tr> <tr> <td>1 project in the last 5 years</td> <td>5</td> </tr> </table>	8 or more projects in the last 5 years	20	5 to 7 projects in the last 5 years.	15	2 to 4 projects in the last 5 years.	10	1 project in the last 5 years	5	20
8 or more projects in the last 5 years	20										
5 to 7 projects in the last 5 years.	15										
2 to 4 projects in the last 5 years.	10										
1 project in the last 5 years	5										
2.	<p>Experience in providing consultancy and demonstrated capability in having executed/completed/ongoing projects of similar nature (CASA/Liability focused) with public sector banks/public sector financial institution/private sector banks in India or global Banks in the past 5 years as on 31/03/2024. (i.e., 2019-20, 2020-21, 2021-22, 2022-23 and 2023-24).</p> <p>Similar (CASA/Liability focused) projects for business transformation means projects involving any of the below:</p> <ol style="list-style-type: none"> 1. New products launched or existing products revamped. 2. New process introduced or existing 	<table border="1"> <tr> <td>5 or more projects in the last 5 years</td> <td>15</td> </tr> <tr> <td>3 to 4 projects in the last 5 years.</td> <td>10</td> </tr> <tr> <td>2 projects in the last 5 years.</td> <td>5</td> </tr> <tr> <td>1 project in the last 5 years</td> <td>3</td> </tr> </table>	5 or more projects in the last 5 years	15	3 to 4 projects in the last 5 years.	10	2 projects in the last 5 years.	5	1 project in the last 5 years	3	15
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	<p>process revamped.</p> <p>3. Go-to-market and operating model improvements.</p> <p>4. Sales force effectiveness to drive business growth.</p> <p>5. Liabilities Strategy</p> <p>6. Customer retention and engagement.</p> <p>7. Customer Service Improvements</p> <p>Document to be submitted:</p> <p>The bidder should submit relevant purchase order/work order / engagement letter along with reference letter / satisfactory letter/ completion certificate/ email confirmation from the client, duly mentioning the details of the services.</p>		
2.	<p>Resources:</p> <p>Experience of resources (i.e. Project Lead and Team Manager, Senior Consultant, Junior Consultant etc. proposed to be deployed in the project)</p> <p>Experience will be considered if the Project Lead / Team Manager and 50% of team members have provided consultancy services with minimum experience of 3 years in similar (CASA/Liability focused) projects for business transformation projects for Public Sector Banks / Private Sector Banks/BFSI in the last 10 years</p> <p>Document to be submitted: Letter from HR/company secretary and relevant certificate to be submitted. (Resource with more than two years of experience will only be considered)</p>	<p>3 Senior Resources Experience (Marks for each resource)</p> <ul style="list-style-type: none"> ➤ >=7 Years but < 10 Years - 4 Marks ➤ >=5 Years but < 7 Years - 3 Marks ➤ >=3 Years but < 5 Years - 2 Marks <p>4 Junior Resources (Marks for each resource)</p> <ul style="list-style-type: none"> ➤ >=5 Years - 2 Marks ➤ >=4 Years but < 5 Years - 1.5 Marks ➤ >=3 Years but < 4 Years - 1 Marks 	20
5.	<p>Bidder's Existence in the market: The Bidder should have been in operation in India for last five years as on RFP date.</p> <p>Documents to be submitted:</p> <ul style="list-style-type: none"> • Copy of Certificate of LLP registration. (or) • Copy of certificate of incorporation and certificate of commencement of business in case of Public Limited 	<p>2 Mark for every completed additional year over and above 5 years</p>	10



	company. (or) • Certificate of Incorporation in case of private limited company issued by the Registrar of companies.		
6.	Presentation: Presentation representing proposed implementation plan about the detailed approach/ methodology to be adopted for delivering the project milestones and other program deliverables. It should also cover bidder's past experience & citations. (Maximum duration for presentation - 45 minutes)	Points will be assigned by an internal committee based on the methodology, work plan, team composition and presentations. As per Table P-1	35
	Total Marks		100

Bidders who score minimum 70% marks on the technical evaluation criteria as mentioned above will only be considered for commercial bid. The Commercial bids of the applicants with technical marks less than 70% will not be considered for commercial/financial evaluation.

Bidders achieving the minimum passing mark 70% will be considered eligible for Commercial evaluation process.

Presentation of proposal:

Canara Bank will schedule the presentations and intimate the time and locations to the bidders. Failure of a bidder to complete a scheduled presentation may result in the rejection of that Bidder's proposal.

Table P-1

Sl. No.	Presentation Agenda	Details	Max Marks
1	Quality of understanding of the scope of the engagement demonstrated in response to the RFP.	1. Understanding context of the Bank (across both ETB and NTB liabilities) and potential impact and outcomes of the engagement. 2. Understanding the market trends in India and Indian Public/private sector Banks relevant to the engagement. 3. Demonstration of specific ideas and actions which can be implemented based on understanding of starting position and operating context for the Bank.	5
2	Approach, Methodology, Work-plan and expected outcome.	1. Case studies related to RFP. 2. Completeness and robustness of approach and methodology demonstrated in response to this RFP. 3. Outline of Activities/tasks/initiatives and project planning. 4. Milestones/Timelines for completing different activities.	15



		5. Innovativeness of proposed initiatives and tools/methodologies to be deployed to accelerate impact, with a focus on use of next-gen technologies such as Gen AI. 6. Expected outcomes and detailed list of deliverables.	
3	Change Management	Roadmap for process revamp and handling of scenarios resulting from changes implemented in existing products/processes or new products/processes introduced. (Consultant's plan and methodology for handling change related scenarios to avoid any operational, reputational and other risks involved.	5
4	Transfer of knowledge	Roadmap for transfer of analytical tools, engagement platform etc., at the time of de boarding.	10
Maximum Marks for Presentation			35

Terms & Conditions

- Bank reserves the right to conduct interviews of the proposed team members.
- In case of absence of the allotted resource, the standby should perform the job of the absentee.
- Bank may reject such manpower if bank is not satisfied with his/her performance.

Date:

Signature with seal

Name:

Designation:

