

REQUEST FOR PROPOSAL (RFP) FOR DATA LAKE AND BI TOOL

(RFP No. BBNPPAM/RFP/25-26/01)

Sr. No	Activity	Detail
1	RFP Number	BBNPPAM/RFP/25-26/01
2	Document Availability	RFP may be downloaded from below link: https://www.barodabnpparibasmf.in/mandatory-disclosures/RFP-communication
3	Release of RFP	July 15, 2025
4	Pre-Bid Queries	Queries on email by July 22, 2025, 15:00 hrs
5	Bid Submission	August 5, 2025, 10:00 hrs
6	Opening of Bids	August 5, 2025, 15:00 hrs
7	Method of Selection	The method of selection is on the basis of Techno-Commercial evaluation
8	Contact Details	Mr. Vivek Kudal (COO & CFO) Board: +91 22 69209600 Email: vivek.kudal@barodabnpparibasmf.in

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1. Invitation for Bids

Baroda BNP Paribas Asset Management India Private Limited ("**AMC**"), a Joint Venture between Bank of Baroda and BNP Paribas Asset Management Asia Limited, is the investment manager to Baroda BNP Paribas Mutual Fund ("**MF**") and is positioned to serve the varied asset management needs of investors in India through a range of equity, debt and money market offerings.

With a focus on enhancing the overall customer experience, AMC Invites sealed bids for implementation of a Data Lake and BI Tool which will serve the following purposes:

- Centralize structured and unstructured investor and distributor /business data into a unified Data Lake architecture.
- Enable seamless ingestion from diverse internal and external data sources.
- Provide a scalable and secure data architecture adhering to regulatory compliance.
- Implement a powerful visualization and analytics platform for business intelligence (BI) reporting, performance dashboards, risk analytics, performance attribution, etc.
- Improve operational efficiency and data democratization across departments (Sales, operations, product, finance, risk, etc.).
- Provide a platform for advanced analytics, AI/ML use cases, and real-time dashboards.

The last date to submit the sealed bids (soft copy and hard copy) is August 5, 2025, 10:00 hrs. The RFP documents should be addressed to:

Mr. Vivek Kudal
201(A), 2nd floor, A wing, Crescenzo,
C-38 & 39, G-Block, Bandra Kurla Complex,
Mumbai 400051, Maharashtra, India.

The documents (Hard Copies) need to be deposited in the RFP Box kept at reception at the above-mentioned address. Bids received after 10:00 hrs on August 5, 2025, will not be accepted or considered under any circumstances.

2. Bidding Process

Bids are invited in a sealed envelope clearly indicating "**Bid for Implementation of Data Lake and BI Tool**" addressed to Vivek Kudal.

Documents to be submitted in Softcopy and Hardcopy at the details provided above.

The Bidder must enclose the following in the **Technical Bid** to be kept in Envelope – I

1. Letter of Authorization for Submission of Response as Annexure 1
2. RFP Response Covering letter as per Annexure 2
3. Undertaking as per Annexure 3

4. Conformity with Hard Copy Letter as per Annexure 4
5. Team Profile as per Annexure 5

The Bidder must enclose the **Commercial Bid** as per Annexure 6. Commercial Bid to be kept in a separate Envelope - II.

The commercial bids will be opened as per schedule and if any change is there, the date and time of opening of the commercial bid will be communicated later.

Technical Bid Evaluation Criteria:

Based on the details submitted by the Bidder in the Technical Bid, the Technical Evaluation of the eligible Bidder will be carried out as furnished below:

Sr. No.	Category	Sub-Category	Maximum Weightage
1	Technical Assessment	Data Lake: <ul style="list-style-type: none"> - Architecture and Scalability - Data Ingestion & Processing - Data Governance, Security & Compliance 	60%
		BI Tool <ul style="list-style-type: none"> - Connectivity & Integration - Features & Functionality - User Experience & Adoption - Security & Governance 	
2	Company Background, Experience & References		25%
3	Implementation Timeline		15%
	Total		100%

Evaluation Criteria:

This will be a techno commercial evaluation and accordingly the **technical** evaluation will have 80% weightage, and **commercial** evaluation shall have 20% weightage. These weightages shall be taken into consideration for arriving at the Successful Bidder.

The evaluation methodologies of the weightages are as under:

The Score will be calculated for all eligible and technically qualified Bidder(s) based on the following formula:

$$S = (T/T \text{ High} \times 80) + (C \text{ Low}/C \times 20)$$

Where:

S = Score of the Bidder(s)

T = Technical score of the Bidder(s)

T High = Highest Technical score among the Bidder(s)

C = Quote as provided by the Bidder(s)

Low = Lowest Quote of C among the Bidder(s)

The Bidder securing the highest score becomes the successful Bidder

For example – There are three Bidders A, B and C.

Technical score will be arrived at treating the marks of the Bidder scoring the highest marks (A) in technical evaluation as 100. Technical score for other Bidders (B, C, etc.) will be computed using the formula = Marks of B / Marks of highest scorer A*100.

Similarly, commercial Score of all technically cleared Bidder(s) will be arrived at taking the cost quoted by L1 Bidder i.e., the lowest quote from all technically qualified Bidder (say C) as 100. Commercial Score for other bidder(s) (A, B, etc.) will be computed using the formula = Cost of L1 Bidder / Cost quoted by C Bidder * 100.

A “**combined score**” will be arrived at, taking into account both marks scored through technical bid evaluation and the nominal commercial quotes with a weightage of 80% for the Technical Bid and 20% for the Commercial Bid as described below.

The combined score is arrived at by adding Technical Score and Commercial Score. The successful Bidder will be the one who has highest Combined Score.

S. No.	Bidder	Technical Evaluation Marks (T)	Nominal Bid Price in INR (C)	Technical Score	Commercial Score	Combined Score (Out of 100)
1	A	95	71	$95/95*80 = 80.0$	$60/71*20 = 16.9$	$80.0+16.9 = 96.9$
2	B	85	65	$85/95*80 = 71.6$	$60/65*20 = 18.5$	$71.6+18.5 = 90.1$
3	C	90	60	$90/95*80 = 75.8$	$60/60*20 = 20.0$	$75.8+20.0 = 95.8$

In the above example Bidder A with highest score becomes the successful Bidder

The decision of management of AMC will be Final in this regard

Kindly Note: RESPONDENTS SCORING A MINIMUM OF 70 MARKS IN THE TECHNICAL BID SHALL ONLY BE CONSIDERED FOR COMMERCIAL BID OPENING.

Commercial Bids of Bidders securing less than 70 marks shall be returned unopened.

3. Minimum Eligibility Requirements

- The bidder should be a company registered in India as per Companies Act 1956 /2013 or a partnership firm / a Limited Liability Partnership company under the Limited Liability Partnership Act 2008 in India for last 2 years from the date of RFP. **(Certificate of incorporation/Registration is to be submitted).**
- The Bidder should be capable of implementing the project within 6 months from the date of issue of the Purchase Order. **(A self-certificate must be submitted along with the Bid).**
- The Bidder should submit **details of minimum 2 other projects towards ‘Data Lake & BI Tool Implementation’** in India in the BFSI domain in the last 3 financial years.
- The bidder should have a **minimum turnover of Rs. 20 crore (Rupees Twenty crore)** in each of the last 3 financial years i.e. 2021-22, 2022-23 and 2023-24. This must be the individual company turnover and not that of any group of companies. **(This must be substantiated by the audited Balance sheet of the Firm / Company for the relevant years)**

- e) The bidder should have positive operating Profit (as EBITDA i.e., Earnings, Before Interest, Tax, Depreciation & Amortization) in the last three financial years i.e. 2022-23, 2023-24 and 2024-25. **(Copies of the audited balance sheet and Profit/Loss statement of the firm is to be submitted.)**
- f) Bidders should have Sales and support office in India. **(A self-certificate must be submitted along with the Bid).**
- g) The bidder should have support Centre with minimum 03 number of Certified Support engineers. **(A self-certificate must be submitted along with the Bid).**
- h) The bidder must not be blacklisted/debarred by any government/ regulatory body in India and overseas, Bank of Baroda & BNP Paribas group or any of its affiliates. **(A self-certificate must be submitted along with the Bid.)**

Bidders can seek clarifications, raise queries etc. related to RFP by July 22, 2025, 15:00 hrs via email to vivek.kudal@barodabnpparibasmf.in. The reply to clarifications sought or queries raised will be replied within 03 days. No clarifications in any other form will be provided.

Note: Bidder must comply with the above-mentioned criteria. Non-compliance with any of the criteria may lead to rejection of the offer. Photocopies of relevant documents/certificates should be submitted as proof in support of the claims made for each of the above-mentioned criteria. AMC reserves the right to verify/evaluate the claims made by the vendor independently. Any misrepresentation will entail rejection of the offer.

4. Scope of Work

A. Data Lake Development & Implementation

- Design and implement a cloud-native data lake (AWS, Azure, GCP, etc.).
- Design the overall architecture including storage, compute, metadata, ingestion, and consumption layers.
- Implement batch and streaming data ingestion pipelines to Ingest data from:
 - Internal systems such as RTA, fund accounting, CRM, sales MIS, compliance tools, as applicable
 - External sources such as Industry Data (currently, MFDEX), AMFI, NSE/BSE, as applicable
- Define the logical and physical data models.
- Real-time and batch data ingestion
- Create data zones: Raw, Cleaned, Curated, and Sandbox.
- Automate data transformation (ETL/ELT) processes.
- Integrate with source systems: Front Office System(s), CRM, Trading, Market Data Providers, etc.

B. Visualization & BI Platform

- Integration of modern BI tools (Power BI, Tableau, Qlik, or equivalent)
- Create customizable dashboards for:
 - AUM & AAUM trends
 - Special Products trends
 - Channel & Distributor performance
 - Operational KPIs

- Profitability Matrix
 - Risk & compliance insights
- Role-based access control and Attribute Based Access Control
- Self-service analytics and exploration tools
- API layer and query interfaces (Athena, Presto, BigQuery, etc.).
- Real-time dashboards and alerting mechanisms

C. Discovery and Assessment

- Conduct stakeholder interviews and workshops to understand current pain points and expectations.
- Audit existing data sources, infrastructure, and reporting systems.
- Define use cases, personas, and business KPIs.

D. Security, Compliance & Governance

- Encryption (data at rest and in transit)
- Role-based access, data masking
- Metadata management, lineage, and governance
- Compliance with SEBI regulations, RBI guidelines, and ISO/ISMS standards, as applicable
- Full audit trails and logging
- Data confidentiality

E. Support & Maintenance

- Ongoing support and AMC post-implementation
- Helpdesk and SLA-based ticket resolution
- Enhancement and onboarding of new data sources.
- Knowledge transfer and training for internal teams including Admin and end-user manuals

F. Documents to Submit

- Company profile and experience
- Technical proposal (approach, architecture, tools, number of user licences)
- Commercial proposal (in specified format)
- Implementation timeline (preferably go-live within 6 months)

5. Terms & Conditions

By submitting a proposal in response to this RFP:

- a. the bidder accepts all of the terms and conditions set forth in this RFP;
- b. the bidder, if selected, agrees that it will comply with all the conditions in this RFP
- c. acknowledges that AMC is not responsible for any direct or indirect expenses that a bidder may incur in preparing and submitting a proposal or participating in the RFP process
- d. in case of any conflict of interest, the bidder must inform the AMC immediately.

- e. bidder must not attempt to influence, reward or benefit any representative of the AMC, nor offer any form of personal inducement, in relation to the RFP or RFP process.
- f. to maintain a fair and ethical RFP process, AMC may require additional declarations or other evidence from the bidder, or any other person, at any time.
- g. nothing in the RFP, or the RFP process creates a contract or any other legal relationship between the bidder and AMC, unless and until they enter into a contract.
- h. The AMC carries the right to exclude the bidder from the RFP process if the bidder has not provided requested information in the correct format, included a material error, omission or inaccuracy in the documents, breached the RFP Terms or made a false declaration.
- i. AMC may at any time, amend, suspend, cancel or re-issue the RFP or any part of it, or change material aspects of the RFP, such as the timeline, requirements or evaluation approach.
- j. AMC will endeavour to provide accurate information in any communication, and the bidder accepts this information is not independently verified and may not be up-to-date.
- k. AMC will not be liable in contract, tort, equity, or in any other way for any direct or indirect damage, loss or cost incurred by the bidder or any other person in respect of the RFP process,
- l. Bidder will respect the confidentiality of all information given to it by the AMC and will not divulge such information to any third party.
- m. AMC and bidder shall make every effort to resolve amicably, any disagreement or dispute arising between them under or in connection with the RFP.
- n. Any publicity relating to the work to be carried out towards this RFP is strictly prohibited.
- o. Bidders are not permitted to submit more than one bid. The bidders, who fulfil the eligibility criteria, will only be eligible for further process.
- p. The AMC reserves the right to accept or reject any bid in whole or in parts without assigning any reason thereof. The decision of the AMC shall be final and binding on all the bidders. No correspondence will be entertained in this regard. The AMC reserves the right to go in for re-bid process, however this would be decided at the sole discretion of the AMC.

6. Assignment/Sub-contracting

- a. The bidder shall not, without prior consent of the AMC, assign the right to bid or participate in the RFP, to any other person after having made a bid under the RFP process,
- b. The bidder shall not subcontract or permit anyone other than its personnel to perform any of the work, service or other performance required by it under this RFP without the prior written consent of AMC.
- c. The bidder shall also ensure that all subcontractors who are involved in providing any security safeguards or part of it shall not publish or disclose any information in any manner, without the AMC's prior written consent

7. Termination

- a. The AMC shall have option to terminate / cancel this RFP at any stage without any prior notice.
- b. In following events, AMC shall terminate this assignment or cancel any particular order if bidder:

- breaches any of its obligations set forth in this RFP or any subsequent agreement and such breach is not cured within thirty (30) Working Days after AMC gives written notice; or
 - failure by bidder to provide AMC, within thirty (30) Working Days, with a reasonable plan to cure such breach, which is acceptable to the AMC
 - The progress regarding execution of the contract/ services rendered by the bidder is not as per the prescribed timeline and found to be unsatisfactory.
- c. Notwithstanding above, in case of change of policy or any unavoidable circumstances, AMC reserves the right to terminate the RFP process or any subsequent agreement and / or any particular order, in whole or in part by giving successful bidder reasonable notice in writing.

Annexure Formats

Annexure 1 - Letter of Authorization for Submission of Response

Date:

To,
Vivek Kudal
Baroda BNP Paribas Asset Management India Pvt Ltd
201(A) 2nd Floor, A Wing, Crescenzo,
G Block, Bandra Kurla Complex,
Mumbai, Maharashtra - 400051

Dear Sir,

SUB: Authorization Letter for submission of the proposal in response to your RFP

This has reference to your above RFP for Appointment of Bidder for Implementation of a Data Lake and BI Tool

Mr./Ms_____ is hereby authorized to submit the response documents, to submit sealed response, and to sign any documents pertaining to the RFP on behalf of our organization for all the services required by the AMC as called for vide the RFP as referred to above, on behalf of our organization. He/ She is also authorized to take decisions on behalf of the company till the RFP process is completed.

The specimen signature is attested below: Specimen signature of the Representative

Signature of the Authorizing Authority

Name of the Authorizing Authority (Certified Xerox copy of POA of authorized Signatory/authority is to be submitted)

Note:

This letter of authority should be on the letterhead of the principal on whose behalf the proposal is submitted and should be signed by a person competent and having the power of attorney to bind the principal. It should be included by the Organization in its proposal.

Annexure 2 – RFP Response Covering Letter

Date:

To,
Vivek Kudal
Baroda BNP Paribas Asset Management India Pvt Ltd
201(A) 2nd Floor, A Wing, Crescenzo,
G Block, Bandra Kurla Complex,
Mumbai, Maharashtra - 400051

Dear Sir,

SUB: RFP for Implementation of a Data Lake and BI Tool

Having examined the above RFP including all Annexures, the receipt of which is hereby duly acknowledged, we, the undersigned, offer to undertake the services in conformity with the said RFP in accordance with the prices indicated in the financial proposal and made part of the response to this RFP.

We hereby undertake to participate in the RFP process and will provide our services as Bidder if selected, as per the contract signed by the successful Bidder with the AMC

We certify that we are in compliance with eligibility criteria as mentioned in the RFP.

We confirm that we have not made any changes in the templates provided by the AMC as part of the RFP process, except for filling in appropriate columns.

We confirm that our Organization has not been blacklisted/ debarred by any Government or Regulatory bodies in India and overseas, by Bank of Baroda & BNP Paribas Asset Management or its subsidiaries.

We confirm that our Organization does not have any pecuniary liability nor any judicial proceedings or any restraint restricting us in fulfilling the services.

Signature of the Authorized Signatory Name:

Designation:

Name of the Organization: Address:

Annexure 3 – Undertaking

Date:

To,
Vivek Kudal
Baroda BNP Paribas Asset Management India Pvt Ltd
201(A) 2nd Floor, A Wing, Crescenzo,
G Block, Bandra Kurla Complex,
Mumbai, Maharashtra - 400051

Dear Sir,

SUB: RFP for Implementation of a Data Lake and BI Tool

1. Having examined the Tender Documents including all Annexures and Appendices, the receipt of which is hereby duly acknowledged, we, the undersigned offer to supply, deliver, implement and commission ALL the items mentioned in the 'Request for Proposal' and the other schedules of requirements and services for the Merging AMC's & TCs in conformity with the said Tender Documents in accordance with the schedule of Prices indicated in the Price Bid and made part of this Tender.
2. If our Bid is accepted, we undertake to comply with the delivery schedule as mentioned in the Proposal submitted by us.
3. We agree to abide by this Tender Offer for 180 days from date of bid opening and our Offer shall remain binding on us and may be accepted by the AMC any time before expiry of the offer.
4. This Bid, together with your written acceptance thereof and your notification of award, shall constitute a binding Contract between us.
5. We agree that the AMC are not bound to accept the lowest or any Bid the AMC may receive.
6. We certify that we have provided all the information requested by the AMC in the format requested for. We also understand that the AMC has the exclusive right to reject this offer in case the AMC is of the opinion that the required information is not provided or is provided in a different format.

Dated this.....by2025

Yours faithfully,

Authorized Signatory Name:

Designation:

Bidder's Corporate Name Address:

Email and Phone Number:

(This letter should be on the letterhead of the Bidder duly signed by an authorized signatory)

Annexure 4 – Conformity with Hardcopy Letter

Date:

To,
Vivek Kudal
Baroda BNP Paribas Asset Management India Pvt Ltd
201(A) 2nd Floor, A Wing, Crescenzo,
G Block, Bandra Kurla Complex,
Mumbai, Maharashtra - 400051

Dear Sir,

SUB: RFP for Implementation of a Data Lake and BI Tool

Further to our proposal dated _____ in response to the Request for Proposal tender No _____ hereinafter referred to as **"RFP"**, issued by Baroda BNP Paribas Asset Management India Pvt Ltd, we hereby covenant, warrant and Bidder as follows:

The soft-copies of the proposal submitted by us in response to the RFP and the related addendums and other documents including the changes made to the original RFP documents issued by Baroda BNP Paribas Asset Management India Pvt Ltd, conform to and are identical with the hard-copies of aforesaid proposal submitted by us, in all respects.

Yours faithfully,

Authorized Signatory Name:

Designation:

Bidder's Corporate Name Address:

Email and Phone Number:

(This letter should be on the letterhead of the Bidder duly signed by an authorized signatory)

Annexure 5 – Team Profile

Profile of Proposed Team Leader and Core team members covering the following aspects:

- Name
- Present Designation
- Qualifications
- Nationality
- Years in the firm & Total Work experience
- Language proficiency
- Areas of expertise relevant to the RFP Role in the proposed assignment
- Tasks assigned

We hereby acknowledge that the information provided by us is true and to the best of our knowledge.

Signature of the Authorized Signatory Name:

Designation:

Name of the Bidder:

Address:

In each of the scope listed, if more than one professional is available then the indicative profile of each of such professional should be furnished.

Annexure 6 – Commercial Bid

Sr. No.	Details	Amount
1	One-time charges for Implementation of the entire project	
2	Annual Maintenance Charges for dedicated support post go live	
3.	Any other incidental charges with complete details and break up	

Note:

* Total fee quoted above shall be all inclusive i.e., Professional Fee as well as all Out of Pocket Expenses (such as Travel, Lodging and Boarding, Conveyance, Printing, Administrative Expenses etc.).

The AMC shall not entertain any other claims over and above the cost specified in the Commercial Bid. Goods & Service tax will be separately paid by the AMC on actuals at the prevailing rate and must be excluded from the above quote.

The total price quoted above will be considered as full project cost for execution of end to end deliverables of scope defined in the terms of reference.

Total fee quote mentioned above will be considered for scoring in the Techno Commercial bid evaluation.

Note: The AMC will be at liberty to deduct at source any amount that may be required under the prevailing laws, rules and regulations.

Signature of the Authorized Signatory Name:

Designation:

Name of the Bidder:

Address:

Place:

Date:

Seal & Signature of the Bidder