



Expression of Interest (EOI)

For

Engagement of an IT Consultant for consultancy in Infrastructure configuration, ERP Implementation Support & Process Automation at PNB Gilts Ltd.

Date: 20.04.2026

PNB GILTS LIMITED

5, Sansad Marg,

New Delhi, 110001

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Proposed Eol Process schedule:

Sr. No.	Particulars	Dates and Timeline
1	Date of issue of the Eol	20.04.2026
2	Last Date and Time for submission of queries	25.04.2026 till 05:00 PM Queries will be replied by 30.04.2026
3	Last Date and Time for submission of Eol along with supporting documents	11.05.2026 at 04:00 PM
4	E-mail address	Queries should be emailed to puneet.singh@pnbgilts.com it@pnbgilts.com in the format specified in the RFP.

Note: The above schedule is subject to change if required. Notice of any changes will be communicated via Email or notification on the company's website.

1. Introduction

PNB Gilts Ltd. intends to engage a **qualified and experienced IT Consultant** to support a **phased IT transformation program** covering:

1. Server Infrastructure Configuration (hardware already procured)
2. ERP Implementation Support (ERP vendor will be finalized by the company)
3. Consultancy for automation of business processes/Reports like KYC AML, Risk Management, Office automation, etc.

This Expression of Interest (EOI) is issued solely for the purpose of shortlisting eligible consulting entities who may be invited to participate in a subsequent Limited RFP (Request for Proposal) / Tender.

2. Objectives of the EOI

The objective of this EOI is to:

- Assess the capability and experience of interested consultants.
- Identify consultants with hands-on, implementation-focused experience.
- Shortlist a limited number of suitable bidders for issuing a detailed RFP.

Submission of EOI does not guarantee issuance of RFP or award of contract.

3. Broad Scope of Engagement

The indicative scope of the proposed engagement includes:

The proposed engagement shall be executed in a phased and sequential manner, with the Consultant providing hands-on advisory and implementation support across infrastructure, ERP implementation, and business process automation.

The scope described below is indicative and non-exhaustive, intended to assess the Consultant's experience and capability at the EOI stage.

Continuation to subsequent phases shall be subject to satisfactory completion of earlier phases.

3.1 Phase I – IT Infrastructure Configuration & Stabilization

(Hardware already procured)

Inclusions

The Consultant shall provide advisory and hands-on support for:

- Validation of infrastructure architecture shared by the hardware vendor, including:
 - Server topology
 - Storage and backup architecture
 - Environment segregation (Production / Test / DR, etc.)
- Review and submit recommendations for:
 - Operating systems
 - Virtualization layer
 - Storage provisioning and backup configuration
 - Security hardening and configuration best practices
 - Performance tuning and system stabilization
- Coordination with internal IT staff and hardware vendors.
- Preparation of:
 - Final “as-built” architecture documentation
 - System configuration documents
 - Standard Operating Procedures (SOPs)
- Knowledge transfer to designated internal personnel of PNB Gilts.

Explicit Exclusions

The following activities are **out of scope** for Phase I:

- Procurement of hardware, software, or licenses
- Ongoing system administration or managed services post-handover
- Helpdesk or end-user support
- Cybersecurity audits or certification activities

3.2 Phase II – ERP Implementation Support

(ERP Vendor will be finalized by the Company)

Inclusions

The Consultant shall act as an **ERP implementation advisor / the Company’s authorised representative**, providing:

- Review of ERP implementation approach, timelines, and milestones
- Support in:
 - Business process mapping
 - Validation and clarification of functional requirements
- Identification of gaps between business needs and ERP configuration
- Validation of ERP configuration done by the vendor / SI
- Advisory support for:
 - Data migration strategy and test cycles
 - Role-based access, maker-checker workflows, and approvals
- Support during:
 - User Acceptance Testing (UAT)
 - Defect prioritization and closure tracking

- Go-Live readiness assessment
- Post-go-live stabilization support
- Documentation and structured handover to internal users of PNB Gilts

Explicit Exclusions

The following activities are **out of scope** for Phase II:

- ERP vendor selection or evaluation
- Commercial negotiations with the ERP vendor
- ERP licensing or subscription management
- Custom software development or coding
- Acting as a substitute for the ERP system integrator
- Long-term ERP operations or support services

3.3 Phase III – Business Process Automation

Inclusions:

Post ERP stabilization, the Consultant shall support automation initiatives, including:

- Identification of manual, repetitive, or inefficient business processes
- Documentation of “As-Is” processes
- Design of “To-Be” automated workflows
- Feasibility assessment of automation using:
 - ERP functionality
 - Workflow / low-code tools
- Design of automation with:
 - Approval workflows
 - Maker-checker controls
 - Exception handling
 - Audit trails
- Support for pilot implementation of approved automations
- User training and change enablement support
- Preparation of:
 - Automated process documentation
 - SOPs and control notes

Explicit Exclusions:

The following activities are **out of scope** for Phase III:

- Application development
- Procurement of automation tools or platforms
- Heavy integration using custom middleware
- Full RPA factory setup or BOT maintenance
- Ongoing operational support post automation rollout

3.4 Phase-Wise Engagement & Continuation Control

- Each phase shall be treated as an independent milestone.
- Completion of a phase shall be subject to:
 - Achievement of agreed outcomes.
 - Submission of deliverables.
 - Formal acceptance by the Company.
- Commencement of the next phase is not automatic and will depend on:
 - Performance in the earlier phase.
 - Business priorities and management approval.
- Submission to this EOI does not create any commitment to engage the Consultant for all or any of the phases.

4. Eligibility Criteria (Minimum)

Interested entities should meet the following minimum criteria:

- Proven experience in IT consulting/implementation support.
- Experience in server infrastructure configuration.
- Experience in ERP implementation support (not vendor sales).
- Experience in process automation/workflow improvement.
- Ability to provide references for similar assignments.

5. Information to Be Submitted in EOI

Interested parties are requested to submit the following information:

- 1. Profile of the Entity**
 - Background, years of operation.
 - Core areas of expertise.
- 2. Relevant Experience**
 - Brief description of similar projects handled.
 - Client profiles (industry, size) and scope of work executed with the major clients.
- 3. Approach Overview**
 - High-level approach to phased engagements.
 - Experience in working with existing hardware and ERP vendors.
- 4. Engagement Team Details (if applicable)**
 - Key personnel and roles of such personnel.
- 5. Conflict of Interest Declaration**
 - Any affiliation with ERP or infrastructure vendors.

Please Note: Commercial details are NOT required at the EOI stage. Any submission of commercials with EOI may render such expression invalid.

6. EOI Evaluation & Shortlisting

EOIs shall be assessed based on:

- Relevance of experience
- Understanding of scope
- Practical implementation exposure
- Client references

Only shortlisted applicants shall be invited to participate in the Limited RFP process, and this decision shall be solely at the discretion of PNB Gilts.

7. Important Conditions / Information

- Submission of EOI does not create any obligation on the Company.
- The Company reserves the right to accept/reject any or all EOIs.
- The Company may modify the scope of work while floating the RFP.
- All the information/addendum (if any) related to this EOI shall be published on the Company's website.
- All information provided shall be treated as confidential.

8. EOI Submission Details

- Submission Mode: Email (password-protected PDF)/Physical (sealed envelope). The password should not be shared unless explicitly requested.
- Submission Email Address: puneet.singh@pnbgilts.com/it@pnbgilts.com
- Address: PNB Gilts Ltd., 5, Sansad Marg, New Delhi- 110001
- Contact for Clarifications: Mr Puneet Singh, 8588851993