

REQUEST FOR PROPOSAL (RFP)

FOR

Implementation of Privileged Access Management (PAM)

FOR

UBI Services Limited

504-506, 5th Floor, Centrum, S. G. Barve Road, Wagle Estate,
MIDC, Thane (W), Pin code – 400604.

Privileged Access Management (PAM) Solutions

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1. BACKGROUND: -

UBI Services Limited (“UBISL” or “The Company”) is a wholly owned subsidiary of Union Bank of India (UBI) engaged in various activities that range from distribution of Retail Loan products & manpower solutions to the Parent Bank. The Company is a Corporate Selling Agent of Parent Bank and into distribution of various retail and other loan products mainly of Home Loan, Car Loan, Education Loan, and MSME Loan etc. The Company is also providing manpower solutions to various department / process of parent Banks like Centralized Vendor Payment Cell (CVPC), Core Banking Solutions (CBS) Helpdesk, Credit Compliance & Monitoring Cell (CMCC), etc.

2. REQUIREMENTS:

UBI Services Limited (“UBISL” or “The Company”) invites quotations from suppliers (“Suppliers or Bidder”) from open market, Interested suppliers who deal Privileged Access Management (PAM) (Items as per **Annexure A**) related materials or work and meeting the eligibility criteria shall respond to these bid documents. Suppliers shall be selected based on technical scrutiny followed by Financial Bid.

3. SCOPE OF WORK:

The selected Bidder shall be responsible for the implement, and support a comprehensive Privileged Access Management (PAM) solution to secure, control, monitor, and audit privileged accounts across the organization’s IT infrastructure.

The solution must align with industry security standards such as ISO/IEC 27001:2022 and best practices recommended by the National Institute of Standards and Technology Cybersecurity Framework.

Requirement as mentioned in Annexure - A.

4. ELIGIBILITY CRITERIA:

Only those Bidders who fulfill the following criteria are eligible to respond to the RFP document. Offers received from the bidders who do not fulfill following criteria are considered as ineligible bidder.

(a) TECHNICAL BID:

S No.	Eligibility Criteria	Documents Required
1	Bidder must be legally registered entity i.e. Registered Firm / Limited Liability Partnership / Registered Domestic Company	Registration certificate issued by Registrar of Firms / Ministry of Corporate Affairs etc. Also Shop & Establishment License issued by local authority.
2	Valid / Active Shop & Establishment, PAN and GST registration numbers	Self-certified S&E Certificate, PAN and GST copies
3	Annual Turnover of Rs. 25 lakhs. for the last Two financial years i.e. FY 2023-24 & 2024-25.	Audited Financial Statements for the last Two years (if not audited then Financial Statement certified by Chartered Accountant along with Income Tax Return filed for respective year)
4	Work Experience: - The bidder / supplier/ OEM should have a minimum of Three year of experience in IT Services (Dealing in IT product and licenses) to any organization like Banks, Govt. Organizations, PSU, Pvt. Ltd. Organization etc.	Copies of purchase orders from the organizations shall be submitted or Self attested/Undertaking letter to be provided.
5	The bidder / suppliers should not have	An undertaking stating that the

	been blacklisted by any company in the past or services terminated due to poor performance	Company / Firm have not been blacklisted should be submitted.
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(b) COMMERCIAL BID: -

- The Bidder should submit the bid which will contain a Scope of work (as referred in Annexure A).
- The Bidder should give MRP and Quoted / Offered Price.

5. BID DETAILS IN BRIEF:

S No.	Description	Details
1	Bid / RFP No. & Date	UBISL/RFP/IT/2025-26/009 Dated Feb 24, 2026
2	Brief Description of the RFP	Implementation of PAM Solutions Annexure A
3	Address for Communication	IT Manager UBI Services Limited Registered / Head Office: Unit No. 504-506, 5th Floor, Centrum, Wagle Estate, Opp. Raila Devi Lake, Near Satkar Hotel, Thane West, Maharashtra, Pin – 400 604. Phone No.: 022 – 6930 3001, 8880141068 Email: - tenders@ubisl.co.in
4	Date of Issue	Feb 25, 2026
5	Pre-Bid Meeting	Feb 27, 2026
6	Last Date of submission of Bids	March 09, 2026, 6:00 PM
7	Date and time of opening Technical Bids.	March 10, 2026
8	Date of Evaluation of Technical bids and opening financial bids.	March 12, 2026

The bid documents should be delivered / submitted in sealed envelopes and scribed as **“BID for PAM Solutions To UBISL”** to address mentioned above before last date of submission of bids. **The Bidder should compile two separate envelopes, one for technical bid (Documents and technical information) another for Financial Bid which will contain a standard quantity (Number of licenses), MRP and Quoted / Offered Price etc.**

The bidder can send their tender documents in soft copy via email to tenders@ubisl.co.in but documents should be password protected and password can be shared to Manager IT at the time of opening of bid documents which shall be communicated separately.

- The Bid / Offer should be complete in all respects and contain all information asked for in this document
- The Company or UBISL may, at its sole discretion, extend the deadline for submission of bids by issuing an amendment to the RFP Document. The Company also reserves the right to withdraw the RFP at any time without assigning any reason.
- The Bid should be signed by the authorized signatory of the bidder. A Power of attorney or letter of authority to that effect shall be submitted by the bidder along with bid submission.
- All supporting documents / annexures should be duly signed and stamped by authorized signatories.
- The submitted bids should be valid for 90 days from the last date of submission of bid.

6. EMPANELMENT PERIOD AND TERMS:

The empanelment period will be valid for a period of one years (12 months) from the date of issue of an empanelment letter or purchase order. The review of the empaneled vendor may be conducted annually to review the quality of products delivered, timelines and negotiation in products prices. Based on performance, the company may consider extending the term, subject to mutually agreed upon terms and conditions. The Company may terminate the services of empaneled vendors at

its discretion based on review and shall have the right to cancel this panel of vendors at any time during the empanelment period.

The Company is in process of empanelment of vendor / supplier for PAM Solution Subscription for a period of one years. The Company will shortlist three vendors / suppliers based on the following criteria.

- Technically qualified vendors (Top 3)
- Lowest quoted Cost / discount offered (L1, L2, & L3)
- implementation period

The company will place the order to lowest quoted vendor.

7. BID EVALUATION CRITERIA:

Bidder must qualify the technical eligibility criteria and should submit the required documentary proofs as indicated above. Bids which fail to qualify for any of the following criteria will be rejected. To evaluate the technical and commercial bid, the procurement committee constituted by the Company shall examine the documents furnished by the Bidder in the Technical Bid and Presentation to be given by the bidder. Only those bids which satisfy the Eligibility Criteria will be eligible for negotiation of quoted price.

Sr No.	Bidder Credentials	Max. Marks	Supporting Documents
1	Annual turnover more than Rs.25 lakh. in the last Two financial years	20	Audited Financial Statements for the last Two years (if not audited then Financial Statement certified by Chartered Accountant along with Income Tax Return filed for respective year)
2	Minimum Three year of experience in in IT Services (Dealing in IT product and	20	Copies of purchase orders from the organizations shall be submitted.

Sr No.	Bidder Credentials	Max. Marks	Supporting Documents
	licenses) to any organization like Banks, Govt. Organizations, PSU, Pvt. Ltd. Organization etc.		
3	Bidder should not be blacklisted by any corporate / bank for poor performance.	20	Undertaking by Bidder
4	Bidder should provide MSME Registration certificate, GST Certificate, PAN and Company incorporation Certificate	20	Provide Company Document or Certificate as mentioned.
5	Provide Draft Timelines for Delivery and Installation	20	Tentative timeline for Delivery and Installation from the date of PO. on letter head
	TOTAL	100	

Note: The Technical Bid will have 65% weightage and Commercial Bid 35% weightage.

Annexure A (Scop of work)

1. Objective

The objective of this project is to design, implement, and support a comprehensive **Privileged Access Management (PAM)** solution to secure, control, monitor, and audit privileged accounts across the organization's IT infrastructure.

The solution must align with industry security standards such as ISO/IEC 27001:2022 and best practices recommended by the National Institute of Standards and Technology Cybersecurity Framework.

2. Project Scope

The vendor shall provide end-to-end implementation, configuration, integration, testing, training, and support of the PAM solution covering the following components:

Device Count: 20

User Count: 10

3. Technical Scope

3.1 Discovery & Assessment

- Identify all privileged accounts across:
 - Active Directory
 - Windows & VM's Servers
 - Databases (MSSQL, Oracle, etc.)
 - Network Devices (Firewall, Switches, Routers)
 - Applications (Rediff Mail, CRM)
 - Cloud Environments (CRM, Tally etc.)
- Risk assessment of existing privileged access.
- Gap analysis report.

3.2 PAM Solution Deployment

- Installation and configuration of PAM architecture (On-Prem / Cloud / Hybrid).
- Deployment of:
 - Password Vault
 - Session Management

- Privileged Session Monitoring
- Privilege Elevation & Delegation Management (PEDM)
- High availability setup (if required).
- Hardening of PAM infrastructure.

3.3 Privileged Account Onboarding

- Onboarding of:
 - Domain Admin accounts
 - Server Local Admin accounts
 - Root accounts (Linux/Unix)
 - Database Admin accounts
 - Application service accounts
 - Network device credentials
- Elimination of shared accounts (where feasible).
- Implementation of role-based access control (RBAC).

3.4 Password Management

- Secure password vault implementation.
- Automated password rotation policy.
- Emergency access workflow.
- Secure password checkout/check-in mechanism.
- Removal of hardcoded credentials (where applicable).

3.5 Session Management & Monitoring

- Real-time monitoring of privileged sessions.
- Session recording and playback.
- Command filtering and alerting.
- Termination of suspicious sessions.
- Tamper-proof audit logs.

3.6 Integration

- Integration with:
 - Active Directory / LDAP
 - SIEM solution
 - Ticketing tool (if applicable)
 - MFA solution
- API integration (if required).

3.7 Compliance & Reporting

- Predefined and customized reports for:
 - Privileged access activity
 - Password changes
 - Session logs
 - Failed login attempts
- Compliance mapping support for:
 - ISO/IEC 27001:2022
 - NIST CSF
 - Internal audit requirements

3.8 Access Control & Governance

- Implementation of:
 - Least privilege principle
 - Just-in-Time (JIT) access
 - Approval workflow mechanism
- Time-bound access control.
- Dual control (if required).

4. Deliverables

Vendor must provide:

1. Detailed Project Plan
2. Architecture & Design Document
3. Installation & Configuration Document
4. Risk Assessment & Gap Analysis Report
5. User Access Matrix
6. Standard Operating Procedures (SOP)
7. Admin & User Training
8. Knowledge Transfer Documentation
9. Go-Live Signoff Document

5. Training & Knowledge Transfer

- Administrator training (Technical team)
- End-user training (Privileged users)
- Documentation handover
- Minimum 2 KT sessions

6. Support & Warranty

- Minimum 1-year support (as per agreement)

- SLA-based support
- Upgrade & patch support
- Assistance during audits
- Remote & on-site support (if required)

7. Acceptance Criteria

- Successful onboarding of all identified privileged accounts
- Password rotation policy enforced
- Session recording enabled
- Reports validated
- Security testing completed
- UAT sign-off from IT team

8. Project Timeline

Vendor shall provide:

- Implementation timeline
- Milestones
- Resource allocation plan
- Risk mitigation plan