Request for Proposal (RFP)
for
Business Intelligence (BI) Software

TABLE OF CONTENTS

1. INTRODUCTION

1.1. The Trade and Development Bank (TDB)

The Eastern and Southern African Trade and Development Bank (TDB) was established on 6 November 1985 following the provisions of the Treaty of 1981 establishing the Preferential Trade Area (PTA), which has since been transformed into the Common Market for Eastern and Southern African States (COMESA), as part of the regional economic integration arrangement. TDB is a multilateral regional development financial institution headquartered in Ebene (Mauritius) and Bujumbura (Burundi), with regional offices in Nairobi (Kenya), Harare (Zimbabwe) and Addis Ababa (Ethiopia) and Kinshasa (DRC). The Bank's membership comprises 22 Member States from across COMESA, EAC and SADC, 2 non-regional members, Belarus and China, as well as 13 institutional shareholders. TDB's mandate is to finance and foster trade, regional economic integration, and sustainable development through trade finance, project and infrastructure finance, asset management and business advisory services.

The Bank seeks to be a world-class African development finance institution advancing the economic development, integration, and prosperity of the region by being at the forefront of extending development capital and services to advance regional growth and integration through customer-focused and innovative financing instruments while running an efficient and agile operations by leveraging best in class technologies.

1.2 Request for Proposal (RFP) to provide BI Software

TDB has invested in a business warehouse solution to prevent departmental data silos and to make information transparent across the Bank by curating data from various heterogeneous internal and external sources systems. The project is scheduled to come online in the fourth quarter of 2019. To harness the vast data from the warehouse, this RFP is to invite qualified and experienced vendors to submit bids to provide a Business Intelligence (BI) software. The proposed software should be best in class that is heavily used in banking/insurance industries and as the name suggests, the software should provide business intelligence and data analytics capabilities for generating reports, improve productivity and data visualization with

high flexibility to ultimately enable advanced analytics, facilitate just-in time analysis and support TDBs data driven decision making strategy.

2. PROPOSAL GUIDELINES

- Short listed vendors will be invited to demo on site the BI solution to a committee using the provided datasets.
- This Request for Proposal represents the requirements for an open and competitive process. Proposals will be accepted until 21st November 2019, at 11:59 p.m. (Nairobi time) and shortlisted vendors will be invited for onsite demo.
- Technical and Financial sections of the proposals should be in separate documents labeled as Technical Proposal and Financial Proposal in USD.
- All costs must be itemized to include an explanation of all fees and licensing costs and must be stated in USD.
- Contract terms and conditions will be negotiated upon selection of the winning bidder of this RFP. All contractual terms and conditions will be subject to review by TDB and will include scope, budget, schedule, and other elements relating to the assignment.
- TDB is not bound to accept the lowest bidder.

3. TERMS OF REFERENCE (ToR)

BI tool should have the following capabilities and features:

- The ability to connect to wide variety of data sources, at minimum SAP Business warehouse, databases (DB2, MS SQL Server), Microsoft products, flat files, etc.
- Business user centric – ease of use for report designers/authors, drag and drop user-driven data combination of different sources, and the creation of analytic models such as multidimensional analysis, what-if analysis dashboards, interactive reports and

user-defined measures, sets, groups and hierarchies, that untimely empower users for self-service analytics;

- Capability to publish and use governed data sources with ease and users can create online and offline reports;

- The software should allow users to integrate and deliver reports and dashboards real-time;

- BI software should be scalable to allow bank wide staffs access reports and dashboards via the web or any devices, from remote locations and via VPN;

- BI platform administration, security and architecture: Capabilities that enable platform security, administering of users/groups based on roles, notification services, auditing of platform access and utilization, and high availability and disaster recovery;

- BI software should support large datasets and perform reasonably well with high volume and velocity of data;

- BI software should have advanced analytics capacities out of the box and support mechanism to integrate with other industry leading tool sets for machine leaning, predicative analytics and data mining/science;

- Mature BI product with a large community of users; readily available resources for self-learning and debugging including free training videos, in-person classroom training, active online support resources (FAQs, knowledge database and samples);

- Relatively easy to find if/when TDB decide to engage subject matter expert consultants;

- The BI Software company to be known for innovation and market leader in the BI industry.

4. CRITERIA FOR SELECTION

4.1 Mandatory Responsiveness Requirements

To be eligible for selection, a proposal shall be
1) timely received from a proposer
2) must demo proposed BI tool to our RFP committee on site

4.2 Expected Deliverables

To deliver a report that shall reflect clear comprehension of the tasks, the methods of execution and work plan to ensure the outcome is in line with Bank's expectations. The report should include BI software roll out plan within the TDB technology ecosystem that spells out: IT resources requirements i.e. systems installations, configuration, infrastructure requirements. In addition, the report should specify timelines and man hour requirement for each task.

4.3 Expected Competencies and Experience

The selected vendor will be responsible for the overall planning and implementation of the software rollout.

The software vendor should meet the following criteria:

i) Have rolled out the BI tool in similar organization or institutions such as Development Finance Institutions (DFIs) or commercial banks;

ii) Have staff for the assignment that have relevant experience and qualifications with a proven track record excellent delivery;

iii) Present a well-articulated and highly professional approach and

iv) Submit competitive price.

4.4 Confidentiality Statement

All data and information received from TDB for the purpose of this proposal is to be treated with confidentiality and only used in connection with the execution of these terms of reference.

4.5 Contents of The Proposal

The proposal should include, but is not limited to the following:

(i) An understanding of the Bank's requirements as listed above;

(ii) Methodology and work plan for performing the assignment;

(iii) Project delivery plans, including a Gantt chart if necessary;

(iv) Detailed reference list indicating the scope and magnitude of similar assignments;

(v) Team composition and task assignment (There should be no change in the team during the assignment without prior agreement); and

(vi) CVs of the task team.

4.6 Proposal Evaluation

Proposals will be reviewed, evaluated, and rated by a committee of qualified personnel based on the evaluation criteria listed. The team will select the most highly qualified vendor for the assignment or the firm whose proposal is determined to be most advantageous to TDB. The following criteria will be used, in order of relative importance from the highest to the lowest, in evaluating each proposal:

(i) Meet business requirements

    a. The proposal clearly meets the business requirements as described in sections 3 and 4 of this RFP;

    b. Successfully showcase the features and capabilities of proposed BI tool at the onsite demo;

    c. The quality, completeness and applicability of sample use of dataset to demonstrate the use of the BI tool to highlight the requirements stated in (Section 3) examples include: ease of use, visual analytics, dashboard/reports, filter, sort, slice/dice & drill down capabilities and advance features etc.

(ii) Proposer and personnel qualifications and experience

    a. Proposer's relevant experience and expertise in performing services as they relate to the requirements discussed in section 4 of this RFP;

    b. Qualifications, experience and competency of professional personnel who will be assigned to the contract by the Proposer including tenure with firm, length of time in the industry and type of experience;

    c. Demonstrated ability of the Proposer to undertake a project of this size.

(iii) Approach

      a. Understanding of the TDB's needs and scope of work;

      b. Soundness of proposed approach, methodology to successfully roll out BI tool as related to the requirements discussed in the term of reference.

(iv) Cost

While this area may be weighted heavily, it will not normally be the deciding factor in the selection process. The TDB reserves the right to select a proposal based upon all the factors listed above and will not necessarily choose the firm offering the best price. The TDB will select the vendor with the proposal that best meets its needs, at the sole discretion of the the bank.

(v) Project Completion Time.

The project completion time will be a factor in assessing the competitiveness of the bid.

Each bidder must submit PDF copies of their proposal, via email with subject: **"PROPOSAL (RFP) FOR BUSINESS INTELLIGENCE (BI) SOFTWARE",** to:

email address: procurement@tdbgroup.org

Enquiries: BiTool_RfpCommittee@tdbgroup.org

By: 21st November 2019, at 11:59 p.m. (Nairobi time).

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