

Technical Bid document

Name of the Bidder:

Section 1	
S. No.	Particulars
1.1	<p>Please provide following information about the Company (Attach separate sheet if required) and all consortium partners. This section should also indicate that the primary bidder is authorised to bid on behalf of other vendor(s) in the consortium along with supporting documents from the other vendor(s). Attach an Authority Letter signed by all the consortium partners, authorising the prime proponent to this effect.</p> <p>Company Name (including Holding Company or Parent Company (if any))</p> <p>Date of Incorporation and years in Business</p> <p>Company's Head Office/Registered Office and addresses</p> <p>Call person(s):</p> <ul style="list-style-type: none"> • Phone • Fax • E-mail • Website <ul style="list-style-type: none"> • Please provide details of ownership: private/public; ultimate parent; major shareholders. Any significant changes in ownership in the last two years? • Names of Directors indicating full time or part time or independent, Names of Promoters etc <p>Management Structure</p>
1.2	<ul style="list-style-type: none"> • How do you feel that your company is a good fit with IRDA? • Where you believe you have a competitive advantage over your competitors, please provide examples of the service areas where your company has domain expertise which differentiates you from other service providers. • Please indicate Staff at Indian Centre with a break-up of the number of employees by function, e.g. Domain Experts (Insurance, Actuarial, Mathematicians etc), Implementation staff, Technical Support staff, experience in implementing web services-integration, Other (please specify).
1.3	<ul style="list-style-type: none"> • Any pending or past litigation (within three years)? If yes, please give details: • Also mention the details of claims and complaints received in the last three years (About the Company/Software that are sold/licensed by the company)
1.4	Please mention turnover for last three years and include the copies of Balance Sheet in support of it.

Section 2	
2.1	<p>Summary giving the overview of the proposal.</p> <ul style="list-style-type: none"> • This shall map to the technical evaluation criteria mentioned in Sub-section 8.24.6 of Part 1 of RFP including Bidder's understanding of the vision of the project and scope of work • Please discuss how your solution can generate savings at Industry level having regard to the implementations you had done earlier. • Please also discuss your perception of the Industry problem along with your approach to the Project. • Please describe how you can support multiple implementation scenarios including phasing of the Project address data related issues and dynamics involved in realizing the objectives of the Project. • Please discuss the road map of your visualized partnership with IRDA/IIB in terms of Sub-section 5.1.2 of Part 1 of RFP including <ul style="list-style-type: none"> ○ How you will help IRDA/IIB to establish Industry level fraud database as well as data analysis, interpretation and reporting environment? ○ How you will help IRDA/IIB to develop statistical and technological models/frameworks in the area of fraud management? ○ What is the proposed data policy and approach to data planning and data formats standardization? ○ What are the recommended knowledge and third party databases for prediction and detection capabilities through appropriate data exchange? ○ How you will support identification and building up of master data, historical data from internal and external sources? ○ Drawing health insurance processes for various analytics and setting up data warehouse/data mart (if required and based on your evaluation) with optimal data loading schedules ○ How will you address extensibility under sub-section 4.17 and continuous improvement opportunities as detailed under sub-section 5.4.9 of Part 1 of RFP.
2.2	<p>Please discuss how proposed solution maps to the requirements under Section 3 to 7 of part 1.</p> <ul style="list-style-type: none"> • What tools are available with your system/solution? • Indicate names of your products which support the features expected of each sub-section under Section 3 and 4 of part 1. • <u>This needs to be in a Traceability matrix as per Section 5.4.1 of part 1.</u> • <u>Requirement wise (Sections 3 to 7 of part 1) mapping to solutions and detailed commentary of solution capabilities and/or your approach to problem is expected.</u>
2.3	<p>Summary of systems proposed</p> <p>Complete the following information for each application software module included in the proposal. Attach any related brochures or other information that would be useful in evaluating the proposed system.</p> <ul style="list-style-type: none"> • System or Module name(s)

	<ul style="list-style-type: none"> • Date of launch • Date when first client went live • Current version and release date • Number of <ul style="list-style-type: none"> ○ Clients using this software in production ○ Clients in India using this software ○ New Installations in the last financial year • Largest customer for this product by Transaction volume • Product revenue as percentage of vendor's total turnover • In case of licensing, explain software licensing system fee structure. Is it restricted as to location of installation e.g. global? • Escrow availability • If there are any other features that will be useful in evaluating the product(s) / solution, please state them • What major enhancements are planned? • Has there been a major rewrite of the proposed systems since the original? • How many releases of your product have been produced during the last five years? • What is the next scheduled major release of your software? • How often are new versions released? • The more the information the vendor is able to provide the more it will assist us in making the appropriate package selection. The items below would be beneficial in completing the evaluation process. Please submit Sample print outs, Sample canned reports and Sample screens.
2.4	<p>Statistical models/algorithms supported:</p> <ul style="list-style-type: none"> ○ Please describe statistical models/algorithms supported by your product such as decision trees, Bayesian classifiers, nearest neighbor classifiers, support vector machines, self-organizing maps, neural networks, regression techniques etc? ○ Please describe how your solution supports both supervised and unsupervised methods?
2.5	<p>Business intelligence capabilities:</p> <ul style="list-style-type: none"> • Please discuss how your solution meets the Text mining/Data mining requirements under Sections 4.22 and 4.23 of part 1. • Please detail various Rule engine capabilities of the solution. • Please discuss other Business intelligence capabilities of the proposed solution in uncovering the Insurance frauds and capturing patterns
2.6	<p>Data management:</p> <ul style="list-style-type: none"> • Describe your logical and/or physical data model. (You may provide the models for review.) • Please describe the ease and process of adding custom fields to your product's data architecture • Do you have Insurance specific or fraud or country specific data model? Please explain how

	<p>IRDA can save on time and efforts.</p> <ul style="list-style-type: none"> • Please also propose a data policy for the Project based on best practices • Describe the control features included within the system to ensure integrity of data (i.e. input and update, totals maintained, crosschecks carried out, audit trails, error reports, etc.) • Mention the standard database management tools used (e.g. schema management, archiving/storage tools, data recovery tools) • What types of import and export capabilities are available for creating customized data feeds? • Mention any message handling protocol or data handling protocol used in the application design. • Please discuss your compliance to Exception/error handling requirements under Sub-section 4.19.3 of Part 1 of RFP. • Please discuss how your solution meets the requirements for creation of knowledge database as mentioned in Section 3.11 (under sub-sections 3.11.1 to 3.11.6) • Please discuss your approach to handle data imputation and techniques you may use.
2.7	<p>Reporting tools:</p> <ul style="list-style-type: none"> • Please discuss in detail how your solution meets sub-section wise requirements under Section 4.24 of Part 1. • Please list the standard reports that are provided in the system. • Does your system provide the facility to generate ad-hoc reports? If yes, indicate the tool / method used to generate ad-hoc reports. • Please define the method in which alerts and escalation are generated in the system. Also list the alert and escalation reports that are generated by the system <p>Please discuss the best practices you are bringing in respect of reports, querying and optimization.</p>
2.8	<p>Deployment :</p> <ul style="list-style-type: none"> • In this section, the precise configuration of hardware and operating software required to operate the system should be provided. Specifically, hardware performance details to efficiently process analytics should be provided. This should include the estimated on-line and off-line storage requirement for program files, data files and available free space for efficient processing. • Please specify the platform, and specific hardware on which your software operates. If the software modules proposed operate in different environments, provide these details for each module. • Overall delivery schedule with delivery lead times for each item of software/hardware solution proposed <p>Please provide an architecture schema on the major components required to implement your product(s). Complement the schematic with typical hardware platforms, OS, memory requirements, and all prerequisites for each component</p> <p>Provide the following details with respect to all the middle-wares that the proposed solution has been interfaced:</p> <ul style="list-style-type: none"> ○ Name of middleware ○ Type of interface ○ Is the interface available “off the shelf” or it has to be customised for IRDA ○ Details of sites where the interface is currently operational ○ Please describe API’s your product contains to support communication via middleware. <p>If the proposed software has not been interfaced with any middleware, provide the following details of the systems that the proposed solution has been interfaced with:</p>

	<ul style="list-style-type: none"> ○ Name of software ○ Type of software ○ Type of interface ○ Is the interface available “off the shelf” or it has to be customised for IRDA ○ Details of sites where the interface is currently operational <p>List any additional utility package required to use the application software in the manner intended</p>
2.9	Network architecture: Please discuss your approach to Network specifications as detailed under Sub-section 4.6.4 under part 1 of RFP.
2.10	Security architecture and failover mechanism: <ul style="list-style-type: none"> • Please discuss your approach and framework for security as detailed under Sub-sections 4.11, 4.15 under part 1 of RFP. • Please discuss the nature and levels of security supported by the system. • In addition, also outline the details and architecture of security components that will need to be installed at IRDA.
2.11	Technologies proposed: <ul style="list-style-type: none"> • Please mention specific environments including development language etc and discuss how the solution could interface with systems of Insurers and others. • Please discuss how you will support IRDA/IIB to overcome the implementation issues with regard to interfacing as Insurers and others are operating at different IT Maturity levels • Please confirm that you have refrained from using any open source products/programs without an enterprise end user license agreement for any requirement as required in RFP.
2.12	Application architecture <ul style="list-style-type: none"> • Please give detailed architecture (diagrams/ description) of the above based on both <ul style="list-style-type: none"> ○ Applications ○ Database • Please give detailed architecture (diagrams/ description) of the interconnectivity between the above.
2.13	Testing and acceptance approach and methodology: <ul style="list-style-type: none"> • Please describe your compliance to requirements under Sub-sections 6.2 of Part 1 of RFP • Please describe your compliance to load and stress testing requirement. Please detail your approach/strategy/ tools, development of benchmarks and reporting thereof.
2.14	Sizing: Please discuss your approach for both hardware sizing and solution sizing having regard to requirements defined under sections 4.6 of Part 1 of RFP.
2.15	Scalability <ul style="list-style-type: none"> • Please provide details on scalability based on the product(s) architecture. • Please discuss your compliance to requirements under sections 4.8 of Part 1 of RFP. • Please also discuss your compliance with scalability requirements with reference to Performance/Response times/Load handling as described under section 4.7 and 4.26 of Part 1 of RFP. • Please discuss : <ul style="list-style-type: none"> ○ Is scalability dependent on product software and/or hardware? To what extent can hardware be added without impacting functionality and performance? ○ Can the system be distributed securely across multiple remote (geographic) environments and servers? ○ What load balancing features are provided in your product(s)? • What is the maximum number of transaction processed per second (TPS) supported? What is the maximum that has been achieved in any live implementation and what is the maximum

	<p>possible in test environment? Please provide all benchmarking details including the environment and specifically the database size.</p> <ul style="list-style-type: none"> Please provide benchmark figures for handling of month end and year end volumes
2.16	<p>Performance and load handling:</p> <ul style="list-style-type: none"> Please discuss your approach to meet the requirements under section 4.7 of Part 1 of RFP.
2.17	<p>Availability :</p> <ul style="list-style-type: none"> Please discuss your compliance to Requirement under section 4.9 of Part1 of RFP. Please describe the type of restart/recovery procedures supported within the package, in the event of transaction or process failure What provisions exist for testing, development and backup copies of your product suite?
2.18	<p>Interfacing:</p> <ul style="list-style-type: none"> Describe, how does the product can provide an interface with IIB, Insurers' and other Third party systems Please describe the techniques with which your product(s) can be interfaced with third party products? Detail how these can be handled and the facilities available. Use additional sheets if required.
2.19	<p>Coupling of modules and Interoperability:</p> <p>A two to three page synopsis of each module should be included, together with sample input forms, screens and output reports. Vendor should specify the following for each module proposed:</p> <ul style="list-style-type: none"> Other modules that are currently integrated with this module. Capability of the product to interface with other products/modules that may be selected. Level of dependence of this module on other modules Integration planned for future releases, including expected date of release The type of integration available within own modules and with external products / databases. If integration is not available between any two modules, and this integration is essential as per the System Requirements of IRDA, any alternative solution the vendor can propose. <p>For each module proposed, where the module does not meet the system requirements in its entirety, the proposal must detail how the module is to be customized. Also indicate the time envisaged to carry out the customizations for each module.</p> <ul style="list-style-type: none"> Please describe the interoperability of your product. What components can be replaced/ retrofitted by other vendor offerings? What components of your application can be used by other applications?
2.20	<p>SLA metrics, measurement & monitoring approach:</p> <ul style="list-style-type: none"> Please discuss your compliance to Section 7 and your proposed metric wise service level under each of the requirements. Please discuss as to how you propose to adhere to the SLAs of the products supplied by OEMs as mentioned in section 7.1 of the Part1.
2.21	<p>Discussion on compliance to standards:</p> <ul style="list-style-type: none"> Compliance to industry standards (prescribed in the RFP or otherwise) Compliance to open Standards as per sub-section 4.12 of part 1 Compliance to other internationally acceptable standards Compliance to ICD – 10 (International Statistical Classification of Diseases and Related Health

	Problems)
2.22	Bill of material for the complete proposed solution (without price). (This should be in consonance with what is stated in the Commercial bid)
2.23	Project plan and governance including GO-LIVE approach, SC and PMU <ul style="list-style-type: none"> • Please discuss your compliance to requirements under Section 5 of Part 1 of RFP. • Please submit indicative project description, approach and methodology, milestones, project organization with their roles and responsibilities, project risks and mitigation plans, dependencies etc. • Please indicate your Organization's broad approach to SDLC including requirement specifications (both functional and technical/software design) • Please also submit your plan for supplying, installing, hosting and implementing the software/hardware covered under this contract from the date of award of contract.
2.24	Project management tools: <ul style="list-style-type: none"> • Please indicate your Organization's broad approach to Project management, scheduled compliance, quality management, variance analysis and approach to project risks and mitigation plans, dependencies etc. • Please give your response as to how you want to work with us through PMU and Steering committees in terms of sub-section 5.4.4 of Part 1.
2.25	Asset management, Disaster recovery and Business continuity: <ul style="list-style-type: none"> • Please describe your compliance to sub-section 4.15.1 to 4.15.5 of Part 1 of the RFP • Please describe your proposed computing infrastructure, Storage infrastructure and Support infrastructure/services details at Data Center and Remote DR
2.26	Capacity building approach: <ul style="list-style-type: none"> • Please provide your compliance to sub-section 6.3.1 and 6.3.2 of Part1 of RFP. • Please provide your compliance to requirements under Sub-section 2.2.11 and 2.2.12 of Part 2. • Please list the availability of various documentation provided with your product(s) <ul style="list-style-type: none"> ○ User manuals, System Administration manual ○ System manuals – Architectures, Entity-Relationship diagrams, Source code etc. ○ Security and On-line Help ○ Any other documentation • How many copies of related software user documentation are provided with the software purchase? • How many copies of related software technical documentation are provided with the software purchase? • Can additional copies be made by IRDA in-house or must additional manuals be purchased? • Are documentation updates available in an electronic form? If yes, please provide details. • Does the vendor provide documentation updates to correspond with each software release? • On what fee basis are additional documentation updates provided? Provide these details in the commercial section. • Does the vendor provide for downloading documents or white papers from its web site • Please provide your compliance to sub-section 2.4.22 and 2.4.23 of Part 2 of RFP with special emphasis on comprehensive knowledge transfer mechanism mentioned therein.

	<p>User Training</p> <p>The vendor should provide the following information:</p> <ul style="list-style-type: none"> • What amount of training is included with the acquisition of the proposed systems, in terms of number of people, type of course/agenda and number of man-days? • Describe all pertinent vendor supplied training courses. For each course, include the following information: <ul style="list-style-type: none"> ○ Cost of course in the commercial section ○ Location ○ Duration ○ Frequency of offering ○ Prerequisites ○ General description • The facilities, support materials and programme including mode of training (standard / self paced) provided for training the users in the use of the system; • Additional available educational and training seminars or courses, with duration should be listed here and the costs for the same costs should be indicated in the Commercial Proposal. 										
2.27	<p>Other Details</p> <ul style="list-style-type: none"> • Bidder needs to give a Declaration, undertaking and agreeing to abide by all the terms and conditions stipulated by IRDA in the RFP including all annexure(s), addendum(s) and corrigendum(s). • The Vendor needs to certify that the systems/services offered by us for tender conforms to the specifications stipulated by IRDA with the deviations clearly described. • If deviations are left blank it will be construed that there is no deviation from the specifications given above). • All requirements which require subcontracting of products and services need to be specified. Please discuss your compliance to sub-section 2.7.2 (on sub-contracting) of Part 2 of RFP • Please discuss your compliance to sub-section 2.2.10 (on performance review) of Part 2 of RFP 										
2.28	<p>Reference Site Details</p> <p>Please indicate experience in handling similar Insurance fraud projects with year wise break-up for last 3 years. You may also please quote at least three reference sites out of which at least one that may be contacted for a discussion on the solution proposed. The reference site details should be given in the following format. Also provide the hardware details for these reference sites. A separate copy of this format should be used for each reference site and at least three reference site details for each product. Please discuss the case studies with emphasis on your implementation approach and how the implementation generated value and return on Investment without adding much to the cost of compliance.</p> <p><i>Reference Company Details</i></p> <table border="1"> <tr> <td>Company Name</td> <td></td> </tr> <tr> <td>Company Address</td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> </table>	Company Name		Company Address							
Company Name											
Company Address											

	Telephone Number	
	Fax Number	
	Contact Name	
	Title	
	What is or was the bidder's role in the implementation?	
	Date of implementation (mm/yyyy)	
	State the duration of the implementation.	
	<i>Software</i>	
	Which Modules of the software implemented by you, are being used? (Name the product & version)	
	Details of the subsequent customizations / modification that were made to the modules for the client.	
Details of sites where the modules are installed		
State, if any, interfaces to external systems are implemented at this site		
Indicate the Hardware and OS platform		
2.29	Technical Constraints / Limitations <ul style="list-style-type: none"> Please list out the technical constraints or limitations of your solution as detailed under sub-section 4.27.4 of Part 1 of RFP. Please describe any limitations that exist in the software/operating system/file manager etc on the volume of data that the proposed package can handle. (number of table entries, accounts, key values, etc.) In case of any limitations existing, the solution should also be provided. Describe the modules in your product which are interdependent along with the nature of interdependence and the possible constraints that this will impose on implementation Describe which requirements are not exactly met by the solutions proposed? Mention any embedded software used 	
2.30	Implementation Approach <ul style="list-style-type: none"> Describe the phases of application installation. What are the average timeframes for each phase for clients similar to IRDA? Describe how the software will be installed initially by the bidder? Describe how data conversion is handled. What utilities are available? What assistance will you provide? What additional technical support will be provided during implementation? 	

	<ul style="list-style-type: none"> • What implementation services do you provide? On-site? • The proposal submitted should contain a list of what the vendor regards are the main milestone activities which constitute the implementation of the proposed systems, from finalisation of contract to full systems hand-over to IRDA. The expected duration of each activity should be shown along with the estimated completion dates for each activity, based on any stated time constraint criteria, such as a date by which a system must be live. • The proposal must show, clearly and unambiguously, which activity completion dates are critically dependent on previous activity completion dates being met. The proposed approach the vendor intends to adopt for systems implementation must be clearly stated. <p>Particular information should be provided regarding:</p> <ul style="list-style-type: none"> • Proposed delivery dates and installation timetable for each application module • Project controls proposed • Expected customisation time, including testing time • Responsibility for formulation of test data • Agreement required from client before system amendments can be started • Proposed method and timing for system set-up
2.31	<p>AMS and Post go-live stabilization Support</p> <p>The responses to this section shall address the requirements of sections 2.5.1 and 2.5.4 of part 2 of the RFP. Details of the support that will be given to IRDA are to be specified in this section of the proposal.</p> <ul style="list-style-type: none"> • If the proposed solution is offered by a consortium, bidders should clearly delineate the commitments and responsibilities for each item proposed. In case of a consortium bid the prime vendor should assume primary responsibility for: <ul style="list-style-type: none"> ○ Authenticity of proposal(s) ○ Installation, customisation, parameterisation, implementation support ○ Testing ○ Maintenance support ○ Co-ordination with all sub-vendors/joint vendors. • Please describe the problem reporting and resolution mechanism that would be used if IRDA identifies a problem with the package. • Do you have a user Hotline? (Y / N) If yes: <ul style="list-style-type: none"> ○ Number: ○ Availability: hours/day (specify time in India) - Does this include weekends? ○ Specify service outside the normal office hours and at weekends. Also specify if the number to be dialled is within India. ○ What is the maximum response time? ○ From which locations in India are support facilities available? • How many releases of your product are currently supported? Please identify • Do you provide support for system customisation? • What is the change management policy? • Please discuss your policy regarding releasing future application software versions to users who

	<p>have modified software (modified either for implementation at IRDA by implementer or a 3rd party). In case modifications/customisations are carried-out by yourself for IRDA, please indicate your policy regarding supporting these modifications/customisations in subsequent versions/enhancements.</p> <ul style="list-style-type: none"> • What facilities do you have for clients to test sample trade data while reviewing the product? What kind of benchmark performance testing are available? What are the procedures? • Is web-based support available? What features are supported?
2.32	<p>Implementation Support</p> <p>The vendor is required to provide the following information:</p> <ul style="list-style-type: none"> • What facilities will be used for the testing of the system during pre-installation and post-installation
2.33	<p>Vendor User Group</p> <ul style="list-style-type: none"> • Is there a user group(s) for the proposed system anywhere in the world? (Yes / No) • Respond to the following only if a vendor user group does exist <ul style="list-style-type: none"> ○ How long has the group been in formal existence? ○ Months/years ○ Is there a membership fee? ○ If “yes” then give amount of fee per year in the commercial section ○ Whether fee mentioned in commercial part: Yes/No ○ Give the number of currently active members ○ How many meetings does the group hold per year? ○ When and where was the last meeting held? • Give the address of the national users group and the individual currently heading the Organisation <ul style="list-style-type: none"> ○ Name ○ Address ○ Telephone