

Life Insurance Corporation of India



Ref : CO/IT/EDMS/2014-15/EOI Dated: 17/01/2015

INVITATION FOR EXPRESSION OF INTEREST

Expression of Interest (EOI)

for

Transformation of the existing

Enterprise Document Management System (EDMS)

of

Life Insurance Corporation of India

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INVITATION FOR EXPRESSION OF INTEREST (EOI)

For Transformation of the existing

Enterprise Document Management System (EDMS)

Life Insurance Corporation of India invites Expression of Interest (EOI) from eligible bidders for the Transformation of the existing EDMS Project. The existing EDMS Project was implemented in the year 2007 and the Contract is expiring in February 2015.

The Transformation of the existing EDMS refers to the redesigning of the existing EDMS Project, with enhancements and upgradation. The existing huge repository of the documents in the form of images, presently available to Corporation's Core Business processes, should continue to remain available in an uninterrupted state and also to be made available for Corporation's other IT Systems.

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PART A - General Terms

A.1 Invitation for Expression of Interest

Life Insurance Corporation of India (LIC) hereinafter, referred to as “Corporation”, is a major public sector enterprise and the largest insurer in India and is engaged in the business of selling life insurance.

Our business and services are supported by the IT systems like Enterprise Front-End Application System (e-FEAP), Portal, Online Data Store (ODS), Corporate Active Data Warehouse (CADW), Enterprise Document Management System (EDMS) including Work Flow System, Mobile Technologies and other standalone legacy systems based on different platforms handled by various operating Departments.

LIC invites 'Expression of Interest' (EOI) from experienced and reputed Document Management Solution and Digitization Service Providers for continuity of the existing EDMS (Refer to A.9.8) deployed in Offices of LIC.

A.2 Guidelines for submission

This document should not be construed as Tender / Request for Proposal (RFP) in any form and would be non-binding on the Corporation in any manner whatsoever.

The EOI document is available for download from our Official Website, www.licindia.in under the link 'Tenders' and also uploaded in Central Public Procurement (CPP) Portal of Government of India under the link <http://eprocure.gov.in/cppp/>.

Payment for the EOI document is to be made at the time of submission of EOI in the form of a Demand Draft / Pay Order issued by a nationalized / scheduled bank located in India drawn in favour of “**Life Insurance Corporation of India**” payable at Mumbai.

Sealed EOI are invited from the eligible bidders, which must be prepared in accordance with the procedures stated in this EOI document and submitted to the **Executive Director (IT/SD), Life Insurance Corporation of India**, not later than the date and time as stated in the Time Schedule (A.3).

The address of the Competent Authority to receive the bids is given below. A drop box is provided to receive the bids.

Executive Director (IT/SD),
Life Insurance Corporation of India,
Central Office,
Information Technology Department,
2nd Floor, Jeevan Seva Annex,
S. V. Road, Santacruz (W),
Mumbai-400054.

A.3 Time Schedule

Time Schedule of Various EOI related events		
1	Date and time of availability of EOI Document for EDMS on LIC Website and CPP Portal, GOI	5 th February 2015 1030 hrs IST
2	Last date for Submission of Queries	12 th February 2015 1730 hrs IST
3	Last date for confirmation for attending the Pre-Bid Conference	13 th February 2015 1530 hrs IST
4	Pre-Bid Meeting	24 th February 2015
5	Issue of Pre-Bid Query Responses and Corrigendum (if any)	27 th February 2015
6	Last date and time for submission of EOI (Two Hard Copies, with one soft copy in a non-rewritable DVD)	12 th March 2015 1530 hrs IST
7	Date & Time of opening of EOI	12 th March 2015 1600 hrs IST
8	Addressee and Office Address for Communication / Place of submission and opening of EOI Document.	Executive Director (IT/SD) Life Insurance Corporation of India, Central Office, Information Technology Department, 2 nd Floor, Jeevan Seva Annex, S. V. Road, Santacruz (W), Mumbai-400054. Email : co_edmseoi@licindia.com
9	EOI Bid / Document Price (Non-refundable)	Rs. 25000/- (Rupees Twenty Five Thousand Only) (To be paid at the time of submission by PO / DD)
10	Bid Security	Rs. 25,00,000/- (Rupees Twenty Five Lakhs Only)
11	Bid Validity Period	Bid must be valid for 180 days from the date of opening of the EOI.
12	Name of the contact person for any clarification	Ms. Rosaline Kurien Secretary (IT/SD) Life Insurance Corporation of India, Central Office, Information Technology Department, Ground Floor, Jeevan Seva Annex, S. V. Road, Santacruz (W), Mumbai-400054. Phone: 022-67090324 E-mail : co_edmseoi@licindia.com
13	Reference No.	CO/IT/EDMS/2014-15/EOI Dated: 17/01/2015

Pre-Bid Meeting and Clarifications:

Pre-registration by prospective bidder and confirmation by LIC for attending the Pre-bid Conference is mandatory. Firms can send email (co_edmseoi@licindia.com) to get confirmation for attending the Pre-Bid Conference.

A Pre-Bid meeting will be held as per EOI Timelines.

Venue: LIC of India, Conference Hall,
3rd Floor,
Central Office, Information Technology Department,
Jeevan Seva Annex,
S. V. Road, Santacruz (W),
Mumbai-400054.

Proposers are strongly encouraged to register for and attend the Pre-Bid Meeting. Proposers should prepare for the conference by reading the EOI document and creating a list of questions to be asked during the conference. All the queries should be received on or before the prescribed date, through email only with subject line "Queries to EOI for EDMS".

EOI will be opened on the stated day at 1600 hrs at the given address in the presence of the bidders' representatives who wish to attend. If the said date of opening is declared as a holiday, the bids will be opened on the next working day at the same time.

Responses to Pre-Bid Queries and Issue of Corrigendum:

- a) LIC will endeavor to provide timely response to all queries. However, LIC makes no representation or warranty as to the completeness or accuracy of any response made in good faith.
- b) At any time prior to the last date for receipt of bids, LIC may, for any reason, whether at its own initiative or in response to a clarification requested by a prospective Bidder, modify the EOI Document by a corrigendum.
- c) The Corrigendum (if any) and clarifications to the queries from all bidders will be posted on the www.licindia.in under Tenders Section and also under the link <http://eprocure.gov.in/cppp/> of CPP Portal, GOI.
- d) Any such corrigendum shall be deemed to be incorporated into this EOI.

In order to afford prospective Bidders reasonable time in which to take the corrigendum into account in preparing their bids, LIC may, at its discretion, extend the last date for the receipt of EOI Bids.

A.4 Bidding Methodology

Expression of Interest is obtained from the eligible bidders. Bidders will be asked to make presentation/demonstration on their capabilities and their proposal. Short-listed bidders would be

issued Request for Proposal (RFP) inviting the technical and commercial bids at a later date. However, the Corporation reserves the rights to go for an open / closed RFP.

The Criteria for selection would include:

- A.4.1** Bidders who meet the Pre-Qualification criteria mentioned in this Invitation to Expression of Interest and
- A.4.2 General Qualifications:** Company profile, Understanding of the Corporation's requirement, Systems proposed, references reflecting similar work with EDMS implementation and related experiences, availability of key resources and infrastructure.
- a) Ability to deliver the stated scope of work, the process / quality methodologies that system integrator adopts, recognition of issues and problems.
 - b) Formal level of relationship with the OEM's involved, if any.
 - c) Capability to provide comprehensive support services for the IT Infrastructure delivered as part of this procurement process.
 - d) Capability to provide non-technical, operational support and activities like logistics, scanning, etc.
 - e) Successful conduct of presentation, proof of concept, demo of the solution proposed as and when desired by LIC.

A.5 Benchmarks / Analyst Reports

Corporation requires that bidders submit results of the Benchmarks for the Solution / Systems proposed, carried out by leading Consultants / External Agencies / Analysts to justify bidders' strengths and experience in the respective fields.

Also provide ranking and market share figures for the IT component proposed as well as the Bidder as a whole, as per the published reports of leading Analysts / External Agencies.

A.6 Reference Sites

In support of the bid submitted, the bidder should provide the references wherein the Bidder has implemented the following:

- A.6.1** – Atleast 1 existing user where similar nature of System Integration services for EDMS implementation including Operational activities have been provided.
- A.6.2** – Atleast 1 existing user where standard EDMS Workflow is implemented.
- A.6.3** – Atleast 1 existing user where the proposed storage / hardware solution with supporting technical and operational personnel is implemented.

A.6.4 – Atleast 1 existing user where the migration / upgradation activity of EDMS related to database or software is implemented.

For all the four items stated above provide the following information wherever applicable:

Name of the referred site	
Address of the site	
Contact person – Name, Designation and Contact Details	
Nature of Business	
Database used	
Hardware and Operating System used	
Application Environment	
Network Environment	
Date of Commencement / Completion of the service	
Size of the operation	
Volume of data	
Size of the database	
Number of Concurrent Users	
Architecture deployed (Whether Centralized or Distributed)	
Brief on Digitization Process - How Scanning is done, where (onsite / offsite)	

A.7 Non Disclosure

The bidder shall not, unless the Corporation has given permission in writing, disclose any part or make use of any part or whole of this EOI document, any specification, plan, drawing, pattern, sample or information furnished by the Corporation (including the users), in connection therewith to any person other than a person employed by the bidder in the performance of the proposal.

A.8 Prime Proponent

The bidder may select OEM/s of Enterprise Content Management(ECM), workflow management , high-end enterprise class Server, Storage Solution and RDBMS. There must exist a strong formal relationship between the OEM/s and the bidder.

The Bidder will be identified as the Prime Proponent and will serve as the primary contact, and take overall responsibility, including obtaining the support from OEM, wherever required. The Bidder must fulfill Pre-Qualification Criteria in his own capacity.

A.9 EOI Terminology

For the purpose of this EOI, the following definitions shall apply.

A.9.1. Transformation of the existing EDMS - refers to the redesigning of the existing EDMS, with enhancements and upgradation. The existing repository of the documents in the form of images, presently available to the Corporation's Core Business processes, should

continue to remain available in an uninterrupted state and also to be made available for Corporation's other IT Systems. LIC, will determine if and when integration / migration to the new solution would be feasible. Ease of migration, total cost, production implications, end users training and adoption, downtime and overall staff time and effort will be key factors in evaluating an integration / migration decision.

Will include in scope the requirement of outbound communication i.e creation, delivery, storage, and retrieval of outbound communications, including those for marketing, new product introductions, renewal notifications, claims correspondence and documentation and bill and payment notifications.

A.9.2. Bidder / Proponent / Prime Proponent / System Integrator – A firm submitting a Bid in response to this EOI.

A.9.3. Corporation / Purchaser - Reference to “the Corporation” and “Corporation” and Purchaser shall be determined in context and mean without limitation “Life Insurance Corporation of India (LIC)“.

A.9.4. Proposal / Bid – The Bidder’s written reply or submissions in response to this EOI .

A.9.5. EOI - The Expression of Interest document in its entirety, inclusive of any addenda / clarification / corrigendum that may be issued by the Corporation.

A.9.6. EULA - End User License Agreement.

A.9.7. Solution / Services / Work / System – “Solution” or “Services” or “Work” or “System” means all services and deliverables to be provided by a Bidder as described in the EOI and include services ancillary to the supply of the Systems, such as transportation and insurance, and any other incidental services, such as installation, migration, commissioning, provision of technical assistance, demonstrations and other obligations of the Supplier covered under the EOI.

A.9.8. EDMS – EDMS refers to end-to-end Solution pertaining to Enterprise Document Management System (EDMS) related to Work Flow, Software, Hardware, Operational functionalities like Logistics, Scanning, DVD upload, etc. System Administrators, Project Management, Technical Support (Onsite and Offsite) for Software as well as Hardware, Help Desk, Portal, MIS, Integration with Corporation Core Systems etc. EDMS is defined as that subset of Enterprise Content Management features required to fulfill the requirements of the LIC to capture, store, manage, preserve and deliver content in an electronic format. The term "content" includes, but is not limited to: paper of any size, electronic documents (PDF, XML, Text Files, Computer generated outputs, emails and MS Office outputs), and rich media (picture, video, audio and computer aided design drawings).

A.9.9. OEM - Original Equipment Manufacturer of Software, Hardware etc.

A.9.10. e-FEAP – e-Front-End Application Package. Core Business System currently available with the Corporation.

A.10 Disclaimer

All information contained in this Expression of Interest (EOI) are in good interest and faith. This is not an agreement and is not an offer or invitation to enter into an agreement of any kind with any party. Bidders should conduct their own investigation and analysis and should check the accuracy, reliability and completeness of the information in this Expression of Interest. Bidders should make their own independent investigation in relation to any additional information that may be required.

The Corporation shall not be bound to give reasons for any decision made and its decision will be final and binding on all the respondents to this EOI, the subsequent Proof of Solutions (POS) and RFP, if any.

PART B - LIC EDMS Project

B.1 Introduction

The Corporation has a distributed architecture across 2048 Branch Offices. EDMS servers provided at Branch are being used by the Branch, Satellite Offices and Customer Zone Users for servicing purpose. Apart from this, additional servers are provided at 105 Divisions as a back-up for Branches and Vice Versa.

For Work Flow System, Servers are provided to 8 Zones and Central Office Departments including LIC's Management Development Centre (MDC).

OmniDocs Suite of products of Newgen is customized to suit the Corporation's Business requirements and integrated with e-FEAP, which is the Core Business System of Corporation for Policy and Agency docket systems. The All India image data consists of approximately 45 crores Policy Dockets, 18 lakhs Agency Dockets and a number of Administrative files stored in Proprietary Newgen (PN) file format.

The year-on-year increase is in the range of 3.5 crores to 5 crores of New Business. At present, approximately on an average, 40 to 50 lakhs of volume of policy records are available in a Division. The volume of business may be expected to double in another 5 to 6 years. The database currently in use is PostgreSQL7.3 and the Operating System is RedHat Enterprise Linux (RHEL4.4) with 32-bit architecture.

Existing EDMS Project – Scope

- a. Logistics – Document Movement
- b. EDMS Software – Customization, Integration, Deployment, Database Administration, Enhancement, Support, Roll out
- c. Business Work Flow Management System
- d. EDMS Technical Infra Servers, Storage/s, OS Management
- e. Scanning Operations – Document Scanning, Quality Checks
- f. Upload – Branch Upload, DO Upload
- g. Support Teams – Installation, Help Desk Support, Onsite Support, Technical Support, Backup, Reporting, Performance Management, MIS

B.2 Objective

The Corporation is seeking to identify a suitably qualified leading Bidder who is able to provide an end-to-end EDMS comprising of but not limited to Supply, Install, Migrate, Commission and maintain the components like Servers, Software, Storage Systems along with associated Peripherals and Tools, with technically qualified Personnel / Administrators, Accessories and Operational services as mentioned in the Scope of Work.

The Corporation has already implemented the EDMS which is operational for the past 8 years and is functioning successfully. The proposed Systems are required for the continuity and scalability of the existing EDMS currently functional at all the Offices of the Corporation and also for scope enhancement in tune with the latest technological advancements and market demands.

Expression of Interest (EOI) is invited for a turnkey end-to-end EDMS along with a Disaster Recovery (DR) Solution in tune with Corporation's guidelines and policies.

Scope of Project Deliverables:

- a. Application Software Enterprise Licensing
- b. Customization and Integration of the Application Software for LIC Requirements
- c. Production, Deployment and Staging Hardware
- d. Implementation Services including Logistics and Scanning services
- e. Technical Support, System Administration, Implementation, End-User Training and Documentation
- f. Knowledge Transfer to LIC Personnel
- g. Solution Testing
- h. Capacity and Scalability Documentation
- i. Post Implementation Maintenance and Support Services
- j. Integration with Corporation's Core Business System/s
- k. Migration Services : Migration of the existing image repository, metadata, indexes etc

PART C - Pre-Qualification Criteria

C.1. Pre-Qualification Criteria

The invitation to EOI is open only to eligible Bidders as per the following qualification norms. The Bidder must provide explicit documentary evidence in support of each pre-qualification criteria, in absence of which the EOI Bid may be rejected summarily at the pre-qualification stage itself.

The Bidder / Prime Proponent should :

- C.1.1 – Be a company incorporated under Indian Companies Act, 2013 or a Government concern.
- C.1.2 – Be a reputed, established Organization and reliable System Integrator having qualified Staff, Financial Resources and installed base, adequate to ensure ongoing ability to deliver and support the proposed total Solutions throughout the System's useful life time, on a 24 x 7 basis, including the ability to provide timely response and service to the Corporation over the period of the contract.
- C.1.3 – The bidder shall provide Enterprise Content Management Software – OEM's appearing in Magic Quadrant for Enterprise Content Management 2014.
- C.1.4 – In case, seeking OEM support, have strong and formal partnership with leading OEM/s to obtain necessary support for Hardware, Database, Software, Storage, etc. The relationship must exist and OEM is Bidder's Choice.

A. Hardware and Storage: OEM of high-end enterprise class Servers for RedHat Linux and Storage Solutions.

B. Operating System: Redhat Latest Server Version, Corporation has Corporate license for the Redhat Server Products.

C. RDBMS: RDBMS compatible with the existing EDMS.

D. Web Server: Any enterprise high-end Web Server (Tomcat is currently being used).

E. Application Server: Any standard Application Server (Java Transaction Server (JTS of Newgen) is currently being used).

F. Software: Any established software customizable and compatible with existing EDMS. (OmniDocs suite of products currently deployed)

The points mentioned from A to F above should be considered keeping in view the smooth Migration to the new System.

- C.1.5 – Have a minimum 10 years of proven experience in providing System Integration, Support and Application Maintenance services.

- C.1.6 – Have proven experience of supply, installation, integration, migration (Refer D.1.2 for the scope), commissioning and maintaining atleast 1 (one) installation in India of EDMS Solution. Provide the references where the implementation activity is complete and the

System is under active usage. Bidder must have done successful implementation of atleast 1 project of EDMS for similar requirements.

- C.1.7 – Have to use legal licenses of the Software and responsible for any third party licenses, if required.
- C.1.8 – Have to comply with all the statutory and legal requirements.
- C.1.9 – Should have ISO-9001-2008 (or equivalent) certification for quality management, ISO-27001-2013 (or equivalent) certification for IT related services and ISO-10244 related to EDMS. Due consideration will be given for any relevant additional valid Certifications.
- C.1.10– For the last three financial years, excluding the current financial year, have annual turnover of at least Rs. 150 Crores from IT services in each year and must have made a net profit in all these last 3 financial years i.e 2011-12, 2012-13 and 2013-14.
- C.1.11 – Provide Bid Security of Rs.25,00,000 (Rupees Twenty five lakhs only). The bid security shall be in Indian Rupees and shall be in the form of a Bank Guarantee issued by a Nationalized / Scheduled Bank located in India and addressed to Life Insurance Corporation of India and should be valid for 45 days beyond the validity of the bid.
- C.1.12– Not have been blacklisted by any Government / PSU / Corporation for corrupt or fraudulent practices or non-delivery, non-performance in the last three financial years.
- C.1.13– Have Pan-India servicing capabilities in order to provide services to nationwide network of Offices of the Corporation.

C.2 Evaluation Process

- C.2.1 LIC will constitute a Bid Evaluation Committee to evaluate the responses of the bidders.
- C.2.2 The Bid Evaluation Committee constituted by LIC shall evaluate the responses to the EOI and all supporting documents and documentary evidence. Inability to submit requisite supporting documents or documentary evidence, may lead to rejection of the EOI bid.
- C.2.3 Each of the responses shall be evaluated to validate compliance of the bidders according to the Pre-Qualification criteria, Proof of Solutions, Demonstrations, Presentations, supporting Documents and the compliance to the general qualification criteria specified in this document.
- C.2.4 The decision of the Bid Evaluation Committee in the evaluation of responses to the Expression of Interest shall be final. No correspondence will be entertained outside the evaluation process of the Committee.
- C.2.5 The Bid Evaluation Committee may ask for meetings with the bidders to evaluate its suitability for the assignment.
- C.2.6 The Bid Evaluation Committee reserves the right to reject any or all bids.

C.3 LIC Rights

LIC may, at its sole discretion, issue a Request For Proposal (RFP) which may be extended only to those vendors shortlisted through the EOI Evaluation and / or Proof of Solution processes. However, for the purpose of any such subsequent RFP, LIC reserves the right to float an open RFP and to amend the proposed requirements, eligibility criteria, the description of services required or any other aspect of this EOI document. LIC may also conclude the process without tendering or awarding any contract.

LIC may reject any or all bids and may or may not waive an immaterial deviation or defect in a bid. LIC's waiver of an immaterial deviation or defect shall in no way modify the EOI document or excuse a vendor from full compliance with EOI document specifications. LIC reserves the right to accept or reject any or all of the items in the bid, to award the contract in whole or in part and / or negotiate any or all items with individual vendors if it is deemed in the LIC's best interest. Moreover, LIC reserves the right to make no selection if bids are deemed to be outside the fiscal constraint or against the best interest of LIC.

In addition to the right to reject any or all bids, in whole or in part, LIC also reserves the right to issue similar EOI / RFPs in the future. This EOI is in no way an agreement, obligation or contract and in no way is LIC responsible for any bidders' cost of preparing the bid, including providing additional documentation or participating in presentations, demos, Proof of Solution, interviews, if required.

C.4 Presentations, Demo, Proof of Solution

C.4.1 Proof of Solution for purpose of this EOI is defined as demonstration of the capability of meeting the requirement set out in this document.

C.4.2 The demonstration has to be done using a part of an existing EDMS and should provide a representative solution through a relatively small number of users acting in business roles to satisfy various aspects of the requirements.

C.4.3 A detailed list of requirements has been provided in the scope of work. Authorized representatives of LIC shall witness the demonstration results.

C.4.4 Each shortlisted bidder based on the pre-qualification criteria shall demonstrate when POS is required. The Bidder is expected to bear the cost of demonstrating the POS and would also be responsible for making the demonstration.

C.4.5 Each bidder shall demonstrate the process flow for the purpose of POS demonstration and Reporting which shall be assessed based on the requirements stated in the Scope of Work and indicated for the purpose.

PART D Scope of Work (SOW)

Services and Deliverables

D.1 Scope of Work

The Corporation desires the Bidder to perform functions (including but not limited to) as mentioned below:

D.1.1 Hardware and Software support

- i. Procure and Supply required Hardware, Software including third party software / licenses if any, Storage Systems along with associated peripherals and accessories
- ii. Installation, Testing and Commissioning Activity
- iii. Maintenance of the proposed System, Backup Activity
- iv. Disaster Recovery System and real time replication
- v. Providing upgraded / advanced version of the proposed software as and when released
- vi. Should provide detailed Hardware specifications including appropriate rack equipment with suitable form factors for optimizing space
- vii. Should be scalable with high availability and reliability
- viii. All servers and components must be compatible with RedHat Linux Operating System, latest Release of Enterprise Server and Advanced Server

D.1.2 Migration of existing EDMS

- i. The migration of the existing database to the proposed database at locations that may be specified by LIC from time to time. LIC may require Migration / Installation on any Enterprise Class RDBMS, OS, Web and Application Servers of its choice for which LIC has EULA. (from existing Database to Corporate Database as decided by LIC, if any, in future)
- ii. Migration of image data (The images are currently in tiff format and stored in PN files).
- iii. Vendor will be fully responsible for all jobs and related dependencies for migration from old system to the new system.

D.1.3 Business Continuity

A proper System back up should be proposed. The Servers are to be backed up with minimal back up downtime or no downtime. The Business should continue 24 X 7 without any interruption.

D.1.4 Additional Capabilities

- i. Should be capable to provide imaging / scanning technologies like ICR, OCR. etc.
- ii. Should be capable to provide expert support in advanced Java Technologies and Database handling.

D.1.5 Integration with Corporation's Other Systems

Seamless Integration with the

- a. Corporation's Core Business System – e-FEAP
- b. Corporation's other Systems
 - Online Proposal and Underwriting
 - RTI Module
 - Portal
 - Intranet
 - Email
 - Corporate Website
 - Other systems as may be required by LIC

D.1.6 Security / Authentication

- i. Proposed system should comply with the IT security policy of the Corporation.
- ii. The proposed solution should meet international standards and best market practices in terms of secure authentication.
- iii. Integrate with the LIC Active Directory (AD) Authentication.
- iv. Integrate with the Core Insurance Authentication System (Custom Authentication Module).
- v. Integrate with Corporation Single Sign On (SSO) Choice.

D.1.7 Network Support

Should categorically submit requirements / recommendations for upgradation / enhancement of the existing Corporation network to meet the demands of the proposed System.

D.1.8 Operational Support

- i. Logistics and scanning activities complying with standard security norms as decided by the Corporation.
- ii. Help Desk

- iii. Online MIS
- iv. Project Management including onsite / offsite support
- v. Training Module development and training to Users as decided by the Corporation.
- vi. Rollout activity – The bidder has to provide a report on the implementation plan and deployment strategy for the end-to-end solution recommended.
- vii. The work shall also include pre-dispatch inspection, transportation to site and insurance.

In short, the bidder should be capable of providing the end-to-end solution including the operational functionalities.

D.1.9 Architecture

Though, we are presently using a decentralized EDMS with servers at Branches and Divisions, we are also open to ideas related to a Centralized System (with a group of servers maintained at one or more sites) or a Semi-Centralized Architecture (where a server / group of servers is / are installed at different locations), if the suggested architecture adds value and is required to achieve the objectives of the proposed project. Corporation requires the bidder to suggest appropriate end-to-end solution for continuing the existing EDMS with latest technological enhancements and additional product features available in the market.

D.1.10 Disaster Recovery

Bidder should propose a Disaster Recovery System (DRS) for the Solution as a whole. Also there should be no single point of failure in any component.

D.2 Profile of the existing EDMS Project

EDMS project was taken up in the Corporation with an intention of providing a strong image repository of all policy dockets as well as Administrative and Agency documents, which will facilitate viewing of images from anywhere with simultaneous access to more than one authorized user at different locations. As of now, the volume of New Business dockets has crossed 45 crores and apart from this, we have digitized incremental documents, Agency dockets and certain CO / ZO departmental Administrative documents also. Approval Work Flow is customized for Policy Docket System as well as Administrative functionalities in the Corporation.

The hardware architecture is EDMS Servers at Branches and Divisions, each being redundant to other (if BO Server is down, users can connect to DO Server and vice versa). The Corporation is having perpetual licence for Software, OmniDocs / OmniFlow Suite of products supplied by Newgen. The images are in tiff format and is stored in PN files (Proprietary - Newgen). The Operating System is RHEL 4.4 and database is PostgreSQL7.3 on 32 bit architecture.

The BO / DO EDMS Server is a single server comprising of the application, storage and data. The digitized images are uploaded in the DO EDMS Server and subsequently it is uploaded in

the BO EDMS Server. If some addition / modification is done at BO EDMS Server, through the sync services, it will be updated in DO EDMS Server and vice versa.

The Core Business is through e-FEAP Module. The users access the e-FEAP Server kept at Divisional Mini Data Centres. Whenever image has to be viewed, the call will come to the BO EDMS Server through e-FEAP and the image will be displayed from the local BO EDMS Server. If BO EDMS Server is down, automatically the image will be fetched from DO EDMS Server and displayed on the client machine. Currently, the authorized users can view any image available in any location.

The scanning partners scan the documents in their own proprietary software and password protected DVDs are used to upload the image data through the OmniDocs suite of products into our System. The compressed scanned images are stored in the PN file format proprietary to Newgen. The data is stored in meta data and also in tables in the database. The prescribed standard for images is tiff format with 200 dots per inch (DPI) and in black and white. Wherever required, colour scanning (Photo Addendum) and images in pdf format are also made available. Necessary utilities / options are available in the existing EDMS to provide required images to the External Agencies / Regulatory Authorities like Insurance Repositories, Legal Entities, etc. MIS like Periodical status reports and Help Desk reports are provided by the Vendors at regular intervals.

D.3 Components and Services

The existing EDMS comprises of Hardware, Software, Database and Network bandwidth and Operational functions like Logistics, Scanning, Upload, DBA Services, Project Management Service, Help Desk etc.

Given below is the specifications of the existing System. The proposed System should be clearly mentioned by the Bidder with all the specifications required including the architecture, network bandwidth requirement, hardware requirement and deployment strategy.

Components			
S.No.	Component / Service	Existing System Details	Remarks
1	Architecture	Distributed with Servers at all 2048 Branches and 105 Divisional Offices	
2	Sync Services	Sync Services are used to update the online data on both Branch and Divisional Servers to be in sync	
3	EDMS Connectors	Integration between EDMS and Core Business Servers is through the object file services	
4	Hardware	Branches are provided with maximum of 3 TB storage space covering 2 lakhs of policy volume	

		Divisions are provided with maximum of 11 TB storage space covering average of 20 Branches	
		Zones are provided with 3 TB storage space for Admin Work Flow	
		Central Office is provided with 8 TB storage space for Admin File Work Flow - Live and a separate Server for Replica	
		Central Office is provided with 2 Servers of 2 TB storage space for Master Index - Live and Replica	
5	Software	OmniDocs / OmniFlow Suite of Products customized as per Corporation's requirements and integrated with Core Business application	Perpetual license available for OmniDocs / OmniFlow Suite of Products
6	Operating System	RHEL 4.4	To be upgraded
7	Database	PostgreSQL 7.3	To be upgraded or replaced with appropriate standard database. Should be capable of migrating to any database as decided by the Corporation, in future
8	Web Server	Tomcat	
9	Application Server	Java Transactional Server (JTS)	Customized for LIC
10	Network Bandwidth / Architecture	CO to ZO, ZO to DO and DO to BO links are available. DR network is also through leased lines.	50% of the network bandwidth is available at any point of time.
11	Backup	At present, LTO-3 tapes are being used for back up	Existing back up has downtime for longer durations.

Services / Deliverables by the existing Vendor

12	Logistics	From LIC Offices to Scanning Centre and from Scanning Centre to Remote Management Facility (RMF)	Taken in batches in a closed and secure vehicle
13	Scanning	As per the standards mentioned in D.2., Documents are scanned by the Vendor at the premises provided by LIC	Scanning operations includes pre-scanning, indexing, and post-scanning activities
14	DVD Creation & Upload	The encrypted scanned images are copied in password protected DVDs and uploaded in designated Servers through a utility	
15	DBA Services	Server Maintenance and System Monitoring including Database Administration, Back-up and House-keeping activities	

16	Project Management Office Services	Co-ordinating Vendor Services with LIC in various levels, including Progress Status Submission, Roll-out of Software releases and MIS Reports	
17	Help Desk	Providing solutions and support for issues raised through Help Desk Portal	Depending on the type of issue (Software, System, Hardware, Operational, etc) different levels of escalation is provided
18	Onsite Vendor team	Onsite Vendor team for customization of the software	
19	AMC / ATS	Annual Maintenance Contract (AMC) for the hardware and Annual Technical Support (ATS) for the software	
20	Training	Periodical training to LIC employees including Refresher training	

The Bidder must provide an integral solution after due consideration about the compatibility issues between the various components. The above list is not comprehensive list of components. The bidder may add any additional components and services that may be needed and can benefit the solution as a whole.

The bidder should position solutions with components appropriate to the requirements and submit high level bill of quantity with detailed specifications for the same as part of the EOI.

D.4 Alternative Options

The proposed solution should have the ability to scale. The systems would be provided for high availability and with no single point of failure and must include but not limited to Servers, Storage Solutions, Console Management, Software, associated peripherals and accessories and Professional Services and Support. The bidder is free to provide multiple / alternative options also in order of preference. In case of multiple / alternative options, the bidder should provide advantages and disadvantages of one solution with respect to others.

The proposed end-to-end solution must be designed considering the desired objective of the Corporation and must necessarily state the benefits that would be available to the Corporation which would be scalable and highly available.

In order to achieve the objective, the Corporation solicits Expression of Interest (EOI) from the leading Bidders to provide appropriate EDMS Services.

PART E - Submission of EOI

E.1 Cost of Bidding

The Bidder shall bear all costs associated with the preparation and submission of its bid and the Corporation will in no case be held responsible or liable for these costs, regardless of the conduct or outcome of the bidding process. The Corporation is not liable for any cost incurred by the bidder in replying to this EOI.

Bidders will be responsible for all costs related to any Demonstration, Presentation and Proof of Solution. Failure to participate in such Demonstration, Presentation or Proof of Solution may result in a Bidder's disqualification for further consideration.

E.2 Response to EOI

The Bidder is expected to examine all instructions, annexures, scope of work stated, terms and technical specifications in the bidding documents. Failure to furnish all information required by the EOI documents or submission of a bid not responsive to the EOI documents in every respect will be at the Bidder's risk and may result in rejection of the bid.

The Corporation reserves the right to

- a) change / modify / delete any part of the EOI document / conditions and / or
- b) reject any or all responses received, without assigning any reason thereof.

Any change by the Corporation will be published in the Corporation website and also in CPP Portal, GOI wherever feasible. Corporation reserves the right to cancel the EOI at any time without penalty and without incurring any financial obligation to any Bidder or potential Bidder.

The Corporation reserves the right to

- a) issue an open tender or RFP.
- b) limit or extend the list of potential respondents beyond those who respond to this invitation.
- c) waive any irregularities or informalities in this EOI process without assigning any reasons.

Submission of EOI shall be deemed to have been done after careful study and examination of the EOI Document with full understanding of its implications. In case of any clarification / query regarding any aspect mentioned in this EOI, the bidder can send an e-mail to co_edmseoi@licindia.com. All material in any form submitted by the bidder will become the property of the Corporation and may be retained completely at its sole discretion.

Evaluation criteria and evaluation of the responses to the EOI will be entirely at Corporation's discretion. The Corporation's decision will be final and no correspondence about the decision will be entertained in any manner whatsoever.

E.3 Bid Security

E.3.1 The Bidder shall furnish along with the bid documents a Bid Security of Rs. 25,00,000 (Rupees Twenty five lakhs only).

E.3.2 The Bid Security shall be in Indian Rupees and shall be in form of a bank guarantee issued by a Nationalized / Scheduled Bank valid for 45 days beyond the validity of the bid.

E.3.3 The Bid Security will be forfeited on account of one or more of the following reasons:

- i. The Bidder withdraws their bid during the period of EOI validity
- ii. The Bidder, having been notified of the acceptance of its bid by the Corporation during the period of validity of bid
 - a) withdraws his participation from the bid during the period of validity of bid document; or
 - b) fails or refuses to participate in the subsequent tender process after having been short listed

E.3.4 Unsuccessful bidder's bid security will be discharged / returned as promptly as possible but not later than 30 days after expiry of the period of bid validity prescribed by the Corporation in A.3.

E.4 General Instructions

E.4.1 All pages of the bid submitted should be serially numbered, signed by the Competent Authority and stamped with Company seal.

E.4.2 The bidder should agree to make presentations and live demonstrations of the proposed System to the Corporation, if required, at a short notice.

E.4.3 The bidder shall bear all the costs for participation in the bid process including preparation of responses to the EOI and must be ready to undertake this activity on its own.

- E.4.4 The bidders shortlisted on the basis of this EOI may be required to develop and demonstrate a Proof of Solution (POS), with basic functionality, if so required by the Corporation.
- E.4.5 The Bid and all correspondence and documents shall be written in English. If more than one language is used, the English version will be taken as official bid. In case of dispute, English version will be taken as final.
- E.4.6 The bid shall be sealed and super-scribed '**Response to EOI – LIC EDMS Project**' on the top right hand corner and submitted at the address specified in the document in A3.
- E.4.7 The Bidder is required to submit two copies of the bid with all supportive documents as mentioned in this EOI. A soft copy of the submitted bid should also be provided in a non-rewritable DVD.
- E.4.8 In case of discrepancies between the information in the printed version and the contents of the DVD, the printed version of the bid will prevail and will be considered as the Bid for the EOI evaluation.
- E.4.9 The bid should contain the copies of references and other documents as specified in this EOI.
- E.4.10 The Corporation will not accept delivery of bid in any manner other than that specified in this EOI. The bid submitted in any other manner, shall be treated as invalid and will be rejected.

E.5 Particulars to be provided by the Bidder

The Bidder should provide all the particulars as per enclosed format from Annexure - I to Annexure - V, which is part of this EOI document.

ANNEXURES

ANNEXURE I**Pre-Qualification Criteria**

No.	Details	Yes / No	Details of the Documentary Proof attached *
1	Bidder should be a company incorporated under Indian Companies Act, 2013 or a Government Concern.		
2.	Bidder should be a reputed, established Organization and reliable System Integrator having qualified Staff, Financial Resources and installed base, adequate to ensure ongoing ability to deliver and support the proposed total Solutions throughout the System's useful life time, on a 24 x 7 basis, including the ability to provide timely response and service to the Corporation over the period of the contract.		
3	The bidder shall provide Enterprise Content Management Software – OEM's appearing in Magic Quadrant for Enterprise Content Management 2014.		
4	Bidder should, in case, seeking OEM support, have strong and formal partnership with leading OEM/s to obtain necessary support for Hardware, Database, Software, Storage, etc. The relationship must exist and OEM is Bidder's Choice. Hardware and Storage: OEM of high-end enterprise class Servers for RedHat Linux and Storage Solutions. Operating System: Redhat Latest Server Version, Corporation has Corporate license for the Redhat Server Products. RDBMS: RDBMS compatible with the existing EDMS. Web Server: Any enterprise high-end Web Server (Tomcat is currently being used). Application Server: Any standard Application Server (Java Transaction Server (JTS of Newgen) is currently being used). Software: Any established software customizable and compatible with the existing EDMS (OmniDocs suite of products currently deployed)		

5	Bidder should have a minimum 10 years of proven experience in providing System Integration, Support and Application Maintenance services.		
6	Bidder should have proven experience of supply, installation, integration, migration, commissioning and maintaining atleast 1 (one) installation in India of EDMS Solution. Provide the references where the implementation activity is complete and the System is under active usage. Bidder must have done successful implementation of atleast 1 project of EDMS for similar requirements.		
7	Bidder should have to use legal licenses of the Software and responsible for any third party licenses, if required.		
8	Bidder should have to comply with all the statutory and legal requirements.		
9	Bidder should have ISO-9001-2008 (or equivalent) certification for quality management, ISO-27001-2013 (or equivalent) certification for IT related services and ISO-10244 related to EDMS. Due consideration will be given for any relevant additional valid Certifications.		
10	Bidder should for the last three financial years, excluding the current financial year, have annual turnover of at least Rs. 150 Crores from IT services in each year and must have made a net profit in all these last 3 years (2011-12, 2012-13 and 2013-14).		
11	Bidder should provide Bid Security of Rs.25,00,000 (Rupees Twenty Five Lakhs Only). The bid security shall be in Indian Rupees and shall be in the form of a Bank Guarantee issued by a Nationalized / Scheduled Bank located in India and addressed to Life Insurance Corporation of India and should be valid for 45 days beyond the validity of the bid.		
12	Bidder should not have been blacklisted by any Government / PSU / Corporation for corrupt or fraudulent practices or non-delivery, non-performance in the last three financial years.		
13	Bidder should have Pan-India servicing capabilities in order to provide services to nationwide network of Offices of the Corporation.		

*** The information provided by the bidder should be accompanied by supporting documentary evidence.**

Bidders' Name :

Authorized Signatory

Seal:

Date:

ANNEXURE II**General Information about the Bidder**

No.	Information	Particulars / Response		
1.	Company Name			
2.	Date of Incorporation/Nature (Pvt/Pub/PSU/Govt.)			
3.	Company Head Office / Registered Office and Addresses Contact Person(s) Phone Mobile Fax E-mail Website			
4.	Name, designation and contact details of the person authorized to make commitments to the Corporation. (Power of Attorney for the Authorized Signatory for this bid should be enclosed)			
5.	Any pending or past litigation (within last three financial years)? (Yes / No) If yes, please give details			
6.	Please mention turnover for the last three financial years excluding the current financial year.	Year wise	Turnover	Profit / Loss
		2011-2012		
		2012-2013		
		2013-2014		
7.	Technical Professional Strength (Under permanent employment with the Organization)			
8.	Whether the Firm / Company has widely accepted certifications. If yes, provide details			
9.	Details of formal relationship with OEM of equipment positioned as part of the EOI with description of the nature of relationship and certified copies.			
10.	Profile of personnel with qualification, experience and relevant certification who can be assigned for installation, migration, commissioning, integration and maintenance of the proposed infrastructure.			
11.	Capability of the bidder to provide 24x7 support			
12.	Details of similar installation (minimum one project) atleast 1 installation where similar nature of System Integration Services for EDMS implementation including Operational activities have been provided.			

	atleast 1 installation where standard EDMS Workflow is implemented. atleast 1 installation where the proposed storage / hardware solution with supporting technical and operational personnel is implemented. atleast 1 installation where the migration / upgradation activity of EDMS Solution related to database or software is implemented. For all the four items stated above, provide the following information wherever applicable: <table border="1"> <tr><td>Name of the referred site</td></tr> <tr><td>Address of the site</td></tr> <tr><td>Contact person name, designation and contact details</td></tr> <tr><td>Nature of Business</td></tr> <tr><td>Hardware and Operating System used</td></tr> <tr><td>Database used</td></tr> <tr><td>Application Environment</td></tr> <tr><td>Network Environment</td></tr> <tr><td>Date of Commencement / Completion of the service</td></tr> <tr><td>Size of the operation</td></tr> <tr><td>Volume of data</td></tr> <tr><td>Size of the database</td></tr> <tr><td>Number of Concurrent Users</td></tr> <tr><td>Architecture deployed (Whether Centralized or Distributed)</td></tr> <tr><td>Brief on Digitization Process - How Scanning is done, where (onsite / offsite).</td></tr> </table>	Name of the referred site	Address of the site	Contact person name, designation and contact details	Nature of Business	Hardware and Operating System used	Database used	Application Environment	Network Environment	Date of Commencement / Completion of the service	Size of the operation	Volume of data	Size of the database	Number of Concurrent Users	Architecture deployed (Whether Centralized or Distributed)	Brief on Digitization Process - How Scanning is done, where (onsite / offsite).	
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Size of the database																	
Number of Concurrent Users																	
Architecture deployed (Whether Centralized or Distributed)																	
Brief on Digitization Process - How Scanning is done, where (onsite / offsite).																	
13	Information about OEM's, if any																

Bidders' Name :**Authorized Signatory****Seal:****Date:**

ANNEXURE III**Compliance Statement****DECLARATION**

We hereby undertake and agree to abide by all the terms and conditions stipulated by Life Insurance Corporation of India (Corporation) in the Expression of Interest (EOI) document including all Annexures.

We hereby acknowledge and unconditionally accept that the evaluation criteria, evaluation of the responses to the EOI will be entirely at Corporation's discretion. Corporation's decision will be final and that the Corporation would entertain no further correspondence about the decision.

We also acknowledge that the Expression of Interest submitted by us is valid for a period of six months, from the date of opening of EOI.

We understand that the bid security furnished by us may be forfeited:

- i. if we withdraw our participation from the EOI during the period of validity of EOI document;
or
- ii. in case we do not participate in the subsequent tender process after having been short listed.

Place:**Signature & Seal of Bidder****Date:**

ANNEXURE IV**Technical Particulars to be provided by the Bidder**

We provide detailed information about the end-to-end solution proposed along with relevant supporting documentations. The proposed solution is designed for high-availability with no single point of failure and atleast 99.99 % uptime.

We submit the Bid with components appropriate to the requirements as stated under:

1. Components and Services as mentioned in D.3.
2. Should necessarily state the issues and challenges that the bidder visualizes in the proposed implementation. Recognition of issues and challenges, effective proposed strategy to address the issues should be part of the proposed solution.
3. Should submit high level bill of quantity along with detailed specification and product documentation.
4. Must state the Hardware Equipment Type, Make / Model, Broad Specifications and Product Highlights.
5. Free to add any additional component in order to complete the proposed solution.
6. Free to provide multiple options in the order of preference. In case of multiple options, the bidder should provide advantages and disadvantages of such options.
7. Should provide compatibility matrix and benchmarks for various components as desired.
8. Should provide migration strategy, methods and tools.

Bidders' Name :**Authorized Signatory****Seal:****Date:**

ANNEXURE V**Covering letter from the Bidder**

(On Company Letterhead)

[Date]

Executive Director (IT/SD),
Life Insurance Corporation of India,
Central Office,
Information Technology Department,
2nd Floor, Jeevan Seva Annex,
S. V. Road, Santacruz (W),
Mumbai-400054.

Ref.: Notice for EOI for “Transformation of the existing EDMS Project of LIC”

Dear Sir,

This is to notify you that our Company intends to submit a Bid in response to the EOI for “Transformation of the existing EDMS Project”.

Primary and Secondary contacts for our Company are:

	Primary Contact	Secondary Contact
Name		
Title		
Company / Bidder Name		
Address		
Phone		
Mobile		
Fax		
e-mail		

We confirm that the information contained in this response or any part thereof, including its exhibits, and other documents and instruments delivered or to be delivered to LIC is true, accurate, verifiable and complete in all aspects. This response includes all information necessary to ensure that the statements therein do not in whole or in part mislead the Corporation in its short-listing process.

We fully understand and agree to comply that on verification, if any of the information provided here, is found to be misleading the short listing process or unduly favours our Company in the short listing process, we are liable to be dismissed from the selection process. We understand that we are liable to be dismissed from the selection process if any association is revealed that may give rise to conflict of interests.

We agree to abide by the conditions set forth in this EOI.

It is hereby confirmed that I/We are entitled to act on behalf of our Company / Firm / Organization and empowered to sign this document as well as such other documents, which may be required in this connection.

Dated this day of 2015

(Signature)

(In the capacity of)

Duly authorized to sign the EOI response for and on behalf of:

Sincerely,

[BIDDER'S NAME] Name

Title

Signature

Date

(Name and Address of Bidder) Seal/Stamp of the Bidder

CERTIFICATE AS TO AUTHORISED SIGNATORIES

I,....., certify that I am of
....., and that who signed the above
response is authorized to bind the Company / Firm / Organization by authority of its governing
body.

(Seal here)

Date :

End of Document

Checklist

The Bid must be organized into the following sections:

1. Title Page
2. Table of Contents
3. Executive Summary - A brief description of the Company's profile focusing on this EOI aspects
4. Annexure I - Pre-Qualification Criteria
 - Company Registration Certificate
 - Company Profile (If multiple partners are represented in the bid, include this information for each partner)
 - Analyst Reports
 - Proof of formal partnership from OEMs
 - Previous implementation reference
 - Referential sites details
 - ISO Certifications
 - Copies of Audited Balance Sheets
 - Bid Security details
 - Disclosure of any judgments, pending litigations, planned sale, merger or acquisition of Bidder's company(ies)
 - Geographical spread of the Company
5. Annexure II - General Information about the Bidder
 - Power of Attorney for the Authorized Signatory for this bid
 - Profile of Key persons
 - Referential sites details as per proforma
6. Annexure III - Compliance Statement
7. Annexure IV - Technical Particulars to be provided by the Bidder
 - Component wise detailed description
 - Road map of the proposed solution and its implementation
 - Strengths / Weaknesses of the proposed solution
 - Detailed Hardware configuration, Software specification and product documentation
 - Multiple options / solutions, if any
 - Compatibility matrix and benchmarks
 - Migration strategy, methods and tools
8. Annexure V - Covering letter from the Bidder
 - Primary and Secondary Contact details

9. EOI Document Price - Payment Details

10. Scope of Work - Understanding of the “overall” project and the scope of work proposed

- Licensing details
- Flexible and scalable licensing

Guidelines for the Bidder:

Hardware / Software / Operating System / Database: Describe the requisite environment required for the proposed solution for all the above components. In the event there is more than one suitable approach, list the best options indicating the relative strengths and drawbacks of each.

Network Environment: Describe the network environment required to utilize the proposed solution. In the event there is more than one suitable network configuration, list options indicating any relative strengths and drawbacks of each.

Integration Capabilities: Provide the capability statement on how the proposed EDMS can integrate with the Core business application of LIC.

System Security: The Bidder must include a detailed description of the proposed solution's security features. A description of how to secure transactions in a distributed network, over LAN, WAN and VPN connections must also be included. The Bidder must also explain in-detail, the security model of the application, and describe the tasks required to configure and maintain application security.

Implementation Plan: LIC recognizes that in 'Transformation of the existing EDMS' there are many possible approaches to implementation. The proposed implementation plan should reflect a best-practice based scenario as per the Bidder's past experience and industry knowledge.

The **Bidder's implementation plan** should include the following:

1. Recommended approach for Implementation
2. Solution map
3. A visual representation of the components and high-level landscape of the proposed EDMS. Indicate integration with current systems at LIC (Core Insurance, MS Exchange, Online Portal, Website, Underwriting system, etc)
4. Recommend implementation approaches including Centralized, Semi-centralized and / or Distributed architecture
5. Migration Plan - Ease of migration, total cost, production implications such as end-user training, downtime and overall effort will be the key factors.

Apart from the above guidelines, the bidder is free to provide any additional information supporting the solution proposed.