

Request For Information (RFI)

FOR

ENGAGEMENT OF CONSULTANT

FOR

IT REVIEW

Last Date of Submission: 24th June 2019

Sealed proposal to be submitted to below address:

Chief Information Officer
SBI Life Insurance Co. Ltd
Central Processing Centre, 8th Floor, Tower-II
Seawoods Grand Central,
Navi Mumbai – 400706

REQUEST FOR INFORMATION / EXPRESSION OF INTEREST**Information Technology Review**

SBI Life is one of the leading Life Insurance companies in India regulated by IRDAI and a subsidiary of State Bank of India – largest Banking Group in India with over 23,000 Branches across India.

SBI Life requests for information with its expression of Interest to engage a suitable “Business Technology” Consulting firm to conduct an overall assessment of the current state of:

- (A) IT Infrastructure landscape covering Data Center operations, DR set up, Network Architecture, Mail / messaging platforms, Active Directory Environment, Endpoint Security, IT Security, Performance monitoring setup and IT asset life cycle management.
- (B) Production Systems involving deployment of Data Base, Virtual Servers, VDI, Blade Servers, ESB's, SAN / NAS storage, backup. Deployment and maintenance of Application in production, performance / availability management.
- (C) Application Architecture, application portfolio analysis, application development, and maintenance, Quality assurance and Configuration management, for core systems, ancillary systems and peripheral systems.
- (D) Project Management Office and Quality Assurance including deployment of resources for bespoke development, vendor management. Quality Assurance involving Unit / systems testing, coordination for UAT by business teams.
- (E) MIS Architecture, Data Repository, Data Marts, Reporting solutions, report dissemination. Financial, regulatory and strategy reporting. Data for Analytics, mining, propensity modeling. Analysis of unstructured data and data lakes etc.
- (F) Digital Technology platform covering Mobile development architecture, adoption of digital technology through DigiLab
- (G) IT procurement and governance, Business – IT coordination, compliance to various guidelines from CVC, CAG, IRDAI, UIDAI, ISO and other statutory bodies. Assessment may be made with respect to the capability of the IT set up to provide sustained availability of the services to support business operations as well as its agility to adopt new changes demanded by the business strategy for the next 3 years.

Specific and actionable recommendations should be provided with rationale and expected benefits and estimates of cost likely to be incurred. Recommendations may be categorized as (A) Significant Gap (B) Scope for Improvement & (C) Good for long term.

We expect the assessment to be completed in 2 calendar months including presentation of final recommendations. All consultants must be on roll of the consulting firm and no sub-contracting is permitted.

Kindly note that in order to rule out conflict of interest, the selected consulting firm will NOT be allowed to participate in implementation of the recommendations.

Interested firms may submit their proposal in format attached in Annexure-A. It is mandatory to comply with the Non-Disclosure Agreement as in Annexure-B. No commercials should be mentioned. This is a request for information only. SBI Life reserves the right to cancel the process at any time without assigning any reason. SBI Life shall short list firms for detailed presentation and evaluation. Details will be shared with shortlisted firms. Decision of SBI Life in the matter of selection firms for presentation / RFP / engagement will be binding and no queries will be entertained in this regard.

RFI response as per annexure along with NDA duly signed by authorized person must be submitted before 24th June 2019 addressed to Chief Information Officer, SBI Life as given in cover page.

ANNEXURE – A

| Sr | Description of Details Required | Applicant's Response to the details required |
|-------|--|---|
| | Respondent's Details | |
| 1 (a) | Name of the Consulting Firm | |
| | Country & Date of Incorporation | |
| | Head Quarters Location | |
| (b) | Primary Contact | |
| | Address for Contact | |
| | Phone / Fax, Email | |
| (c) | Ownership Structure | |
| (d) | Independent analyst report about your Company/Firm (if any) | |
| | Financial Information – Yearwise | Financial turnover in Consulting Business in Rs Crores |
| 2 (a) | Year 2017-18 | |
| (b) | Year 2016-17 | |
| (c) | Year 2015-16 | |
| 3 | The participant should be a profit making entity. It should not have incurred / reported losses during any of the last three financial years. | Audited Balance Sheet or CA certificate. |
| | Please attach audited P & L A/Cs for all the above three years | |
| 4 (a) | Number of IT Consulting Assignments undertaken in the past three years | |
| (b) | Total Man-days IT Consulting Assignments undertaken in the past three years . | Please provide list Sr Name of Client Year No of Man-Days |
| 5 (a) | Number of Consulting Assignments in IT Review for Life Insurance Cos? | |
| (b) | Total Man-days in Consulting Assignments in IT Review for Life Insurance Cos? | |
| 6 | Details of any pending litigation against the firm. | |
| 7 | An undertaking that, no penalties/fines have been imposed on their entities by any Regulator or Govt Agency or any Authority for breach of any Regulations or Laws. Details of any pending litigation against the firm | |
| 8 | List 2 case references with Contact details | |
| (a) | Case Reference for item 4 above | Detailed case study under each of the items 4 and 5 are required. Case study not to exceed 250 words and 1 page (A4). Should include contact details. As per Annexure – C |
| (b) | Case Reference for item 5 above | |

| | | |
|----|---|--|
| 9 | Project Management | |
| | Describe how your firm manages projects to ensure that they are delivered on time, on budget and are of the highest quality. What commitment will you provide to ensure the engagement is completed on time and on budget? Based on this commitment will you accept a financial penalty if the engagement is not completed as required? Please explain. | |
| 10 | Are you willing to sign SBIL NDA as in annexure B | |

ANNEXURE B - NON DISCLOSURE AGREEMENT

This Nondisclosure Agreement ("NDA") is made and entered into this ____ day of _____ in the year two thousand and nineteen.

Bidder's Name, a company incorporated under the laws of Indian Companies Act, 1956 and having its registered office at _____, hereinafter called the 1st party

Has been issued a request for information, hereinafter referred to as RFI, by

SBI Life Insurance Co Ltd (hereinafter called SBIL) a company incorporated under the laws of Indian Companies Act, 1956 and having its registered office at Mumbai, hereinafter referred to as the 2nd Party

The 2nd party has provided certain proprietary information, regarding its products, service, organization, decision processes, strategic business initiatives, technical infrastructure, working processes, delegation of responsibilities, project management, planning methods, reports, plans and status including but not limited to technical manuals, specifications, product features, customer list, specialisations, documents, financial statements and business/development plans etc. to the 1st party to facilitate response to the RFI.

NOW, THEREFORE, in consideration thereof, the 1st party agrees

1. to hold all Confidential Information received from the 2nd party in confidence for a period of two (2) years from the receipt of the Information. The 1st party will use such Information only for the purpose of responding to the RFI
2. to restrict disclosure of such Information to its employees and employees of its affiliated companies with a need to know and inform such employees of the obligations assumed herein. Recipient will not disclose such Information to any third party without the prior written approval of the 2nd Party.
3. to protect Information received from the 2nd Party with at least the same degree of care as it normally exercises to protect its own proprietary information of similar nature.
4. to ensure that their employees / agents / representatives / Directors will not disclose any information so received even after they cease to be employees / agents / representatives / Directors of the recipient. The recipient party shall ensure this by own internal agreements.

IN WITNESS WHEREOF, the 1st party has caused this Agreement to be executed as of the date set forth above.

<Bidder's Name>

By: _____

Name: _____

Title: _____

Date: _____

ANNEXURE – C

CASE Reference check with clients (Overall IT consulting)

Reference 1

| | | |
|---|------|----|
| Company Name | | |
| Company Address | | |
| Telephone Number | | |
| Telephone / Mobile | | |
| Contact Name | | |
| Title | | |
| What is or was the consultant's role in the implementation? | | |
| Period of engagement | From | To |
| Customer willing for reference call? | | |
| Brief Description of the engagement. (about 250 words) | | |
| | | |

CASE Reference check with clients (IT Consulting for Insurance Company)

Reference 2

| | | |
|---|------|----|
| Company Name | | |
| Company Address | | |
| Telephone Number | | |
| Fax Number | | |
| Contact Name | | |
| Title | | |
| What is or was the consultant's role in the implementation? | | |
| Period of engagement | From | To |
| Customer willing for reference call? | | |
| Brief Description of the engagement. (250 words) | | |
| | | |

COMPANY SEAL

Authorized Signatory (Name and Designation)

Name of Consulting Firm