



Institute of Actuaries of India

302, Indian Globe Chambers, 142, Fort Street, Off D N Road, Mumbai - 400 001

+ 91 22 67843333 + 91 22 67843330

Date 10/04/2017

General Information

Request for Proposal (RFP)

Ref no: IAI01/10/04/2017

for

**Design, Development, Implementation, Deployment & Maintenance
(Website and Mobile Application)
(www.actuariesindia.org)**

At

INSTITUTE OF ACTUARIES OF INDIA
302, Indian Globe Chambers,
142, Fort Street, Off D N Road, Mumbai - 400 001

Important Date & Information		
1	Tender Fee	Rs. 1,000/- (Non-refundable) in the form of Demand Draft in favor of Institute of Actuaries of India, payable at Mumbai.
2	EMD	Rs. 1,00,000/- in the form of Demand Draft in favor of Institute of Actuaries of India, payable at Mumbai.
3	Tender Publish Date	10/04/2017
4	Format of bid submitted	Hard copy along with soft copy in CD/USB
5	Last Date for seeking clarifications, if any	21/04/2017
6	Pre-Bid Meeting date, time & venue	18/04/2017 at 12:00 (Noon), Venue : INSTITUTE OF ACTUARIES OF INDIA 302, Indian Globe Chambers, 142, Fort Street, Off D N Road, Mumbai - 400 001
7	Uploading of clarifications/ reply to Pre-bid queries on the IAI Website.	22/04/2017
8	Bid Validity	180 days from the date of submission of bids
9	Last Date of Submission of Bids	25/04/2017 by 3.00 p.m.



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10	Address for submission of Bids	INSTITUTE OF ACTUARIES OF INDIA 302, Indian Globe Chambers, 142, Fort Street, Off D N Road, Mumbai - 400 001
11	Venue, Date and time of opening of Technical Bids.	Address as above. Date. 26/04/2017 Time 11.00 a.m
12	Date and time of opening of commercial bids.	Will be intimated in due course to technically short listed bidders only
13	Contact details	Shri. Larry Barretto, (Manager – IT and Member Services) Phone: +91 22 67843306 / 8879594030 E-Mail: it@actuariesindia.org
14	Institute's Website	www.actuariesindia.org



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Statement of Confidentiality

The information contained in this Tender Document or subsequently provided to Bidder(s) or applicants whether verbally or in documentary form by or on behalf of Institute of Actuaries of India (hereinafter "IAI") or by any of their employees or advisors, shall be subject to the terms and conditions set out in this Tender Document and all other terms and conditions subject to which such information is provided. The purpose of this tender document is to provide the Bidder(s) with information to assist the formulation of their proposals. This Tender Document does not purport to contain all the information each bidder may require. This tender document may not be appropriate for all persons, and it is not possible for the IAI, their employees or advisors to consider the investment objectives, financial situation and particular needs of each bidder who reads or uses this tender document. Each bidder should conduct its own investigations and analysis and should check the accuracy, reliability and completeness of the information in this tender document and where necessary obtain independent advice from appropriate sources. IAI, its employees and advisors make no representation or warranty and shall incur no liability under any law, statute, rules or regulations as to the accuracy, reliability or completeness of the tender document. IAI may in their absolute discretion, but without being under any obligation to do so, update, amend or supplement the information in this Tender Document.



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Introduction

Sub: Quotation for "Design, Development, Implementation, Deployment & Maintenance of Institute of Actuaries of India (Website and Mobile Application) (www.actuariesindia.org)"

Dear Sir,

The Institute of Actuaries of India is a statutory body set up by an Act of Parliament i.e. the Actuaries Act, 2006 to regulate and develop the profession of Actuaries. It is functioning under the overall administrative jurisdiction of Ministry of finance, Government of India, and its Head Office is located at "302, Indian Globe Chambers, 142, Fort Street, Off D N Road, Mumbai - 400 001".

IAI proposes to develop a new website and mobile app (www.actuariesindia.org) as per enclosed Scope of Work and accordingly sealed quotations are invited for "**Design, Development, Implementation, Deployment & Maintenance of website and mobile app (www.actuariesindia.org)**" on turnkey basis.

The sealed quotation is to be sent to **Executive Director, The Institute of Actuaries of India**, by name at the Institute's Head Office in the envelope super scribing **Quotation for " Design, Development, Implementation, Deployment & Maintenance of Institute of Actuaries of India (website and mobile app) (www.actuariesindia.org)"** due on **25/04/2017 by 3.00 p.m.**

Thanking you,

Yours faithfully,

Rajendra Upadhyay
Executive Director



Institute of Actuaries of India

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Part 'A'

Scope of Work

The Institute of Actuaries of India is a statutory body under the act of parliament i.e., the Actuaries Act, 2006 to regulate and develop the profession of Actuaries. It has its head office at 302, Indian Globe Chambers, 142, Fort Street, Off D N Road, Mumbai - 400 001.

The Institute wishes to build and develop its website www.actuariesindia.org, which is developed in ASP .NET platform along with mobile app (android and iOS). Initially the new website development will be done, after successful completion of the same mobile app will be developed.

The expected Scope/deliverables pertaining to www.actuariesindia.org is placed below:

Scope / Deliverables:

1. Development of new website with a dynamic content management system using ASP.Net technologies: VB.NET, ASP.NET, C#, Visual Studio, Entity Framework, software development experience using Microsoft .NET 3.0 or above. Develop and deliver the mobile application on application store (Google Play Store and Apple Store) within 30 days of completion of the mobile application.
2. Creation of database using MS SQL, Data archival, MIS generation Dashboard & Graphical representation- Pie Chart, Histogram, Bar Chart etc. at various levels as per the requirement of the modules.
3. Hosting of Website on hosting service providers Server.
4. Provide Technical Resource for maintenance of the Website/ Mobile App.
5. Platform iOS – 7 and above.
 - Display orientation Portrait or landscape both
 - Display Support iPhone (480 x 320), iPhone Retina (960 x 640), iPhone 5 (1136 x 640), iPad (1024 x 768), iPad Retina (2048 x 1536)
6. Android – 4.0 (Jelly Bean) and above.
 - Display orientation Portrait or landscape both
 - Display Support Small (426dp x 320dp), Normal (470dp x 320dp), Large (640dp x 480dp), XLarge (960dp x 720dp)
7. The developed website and mobile application should consider the performance measures in terms of memory, CPU consumption.
8. The solution architecture should be able to address the future scalability requirements, in terms of both application (to add new services) and infrastructure and backend (adding more users) for website and mobile application.
9. To maintain a centralized database consisting of all information and integrate all the functional areas so that all relevant information is always available with latest &

updated information online. This will also ensure accuracy, completeness and consistency of the information.

10. Provide interfaces required to integrate the solution with other systems and solutions.
11. Integration of payment gateway using secured and latest approach.
12. All data exchanges should be using SSL wherever necessary to offer a Safe and secure Web site experience.
13. The new website should be facilitated with an advanced and comprehensive Content Management System (CMS) solution as is available in the existing website. Some of the existing features are creating users, creating roles, uploading contents, editing contents, content version control etc.
14. Website response time should not be more than 3000 milliseconds. (Documentary evidence in this regard to be submitted)
15. All the contents, facilities and services as is available in the existing website are to be taken in the new website with reorganization of options and contents as per educational websites. In case required, new options may have to be created.
16. Additional features like Members Login, Members Alumni, Innovations, Initiatives, Flash news, Committee's Event, Notification, e-Services, announcements scrolling, chapter details creation/modification/deletion/deactivation and any other options as may be provided by IAI during requirement gathering session will have to be designed and developed.
17. Study / Understand the requirements of the Institute and submit SRS and design document for approval of the Institute.
18. Design and submit minimum five attractive templates with professional look and feel for the home page of the Institute's website out of which one template may be finally selected by the IAI management for implementation. All five templates are to be initially got approved by the IAI Management and in case any of these templates is not found suitable, the bidder has to replace it with another new template. Color print outs and soft copy of five sample templates should be submitted to IAI.
19. Prepare and submit the design documents for mobile application for review and sign off.
20. Studying the problems / issues in the existing website and providing solution for the same in the new website.
21. Design all other pages of the website as per the approved / accepted home page template and getting these approved by the Institute before implementation.
22. The new template designs should be compatible to all web browsers.
23. The new template designs should be responsive (compatible to all mobile devices, tabs etc), bug free and should have Optimistic navigation, animated Images on home page with banners and sliders.
24. Resolution independent Mobile App that will automatically expand/compress itself as per the screen resolution.
25. All the pages of the new website should be mobile friendly and SEO friendly.
26. Search Engine Optimization of websites must ensure high rank on web searches and all relevant techniques for SEO (Search Engine Optimization) must be adopted.
27. During development and warranty phase, bidder has to provide graphics design support required for creating images on website home page

/ other pages.

28. Uniformity in look and feel of the pages should be maintained across the website.
29. New website should support and be compatible with HTML 5/CSS3.
30. All existing features/ modules of the current website should be migrated during new website development process.
31. Bidder will be responsible for migration of the complete data from the existing website to the new website
32. All the database driven query modules (for e.g.; member's login, member's administration module, Statistics, Reports in the child portals etc) as is available in the existing www.actuariesindia.org site are to be implemented in the new website with uniform look and feel of the pages. In case these modules are to be customized / redeveloped for the purpose, the same is to be done by the bidder.
33. Handover all the source codes, deployment document, user manual, admin manual, CSS, source files etc., and any other files used for the development to the Institute.
34. Handover technical and user manuals / documentations pertaining to the development to the Institute.
35. Provide warranty maintenance support for a period of 12 months for the new website www.actuariesindia.org and mobile app from the date of acceptance of all the deliverables in writing by the IAI to cater to all kind of bugs, issues, minor and cosmetic changes etc.
36. Comprehensive and adequate Technical, Administration and operational training should be provided to the IAI users (Content Management Training, , Application Submission Training, Support Handover etc.)
37. All costs other than hardware cost should be included by the bidder in the commercial bid.
38. The Institute may like to avail the maintenance support for the new website and mobile app after the 12 months warranty period and the bidder shall have to extend its support at the cost quoted in the commercial bid for at least next 3 years after the warranty period.
39. Defining and provisioning the hardware specification for the new web platform and Creating detailed project deliverables document.
40. Deploying the new websites and going live with them.
41. Building the required bridges, connectors, reports, etc.
42. Managing security for the system.
43. Managing Operating system and software updates.
44. **Archival of old data:** The architecture being implemented by the bidder should provide for the archival of older content and for backing up the same offline.
45. Web visitors count feature is to be implemented in the home page of the new website.
46. New website should be integrated with the social networking sites like FaceBook, Twitter, LinkedIn, YouTube etc.
47. All third party links as is available in the existing website should be made available in the new website. In short, transition to the new platform should in no way reduce the search engine rankings or page rank of IAI's website. All new links should be search engine friendly.
48. New website should have Multilingual features (Hindi, English, Bengali, Tamil,

Telugu, Gujarati, Kannada, Malayalam, Oriya, Marathi) including content change to other languages (data change).

49. Child portals are maintained for member's administration, Global Conference Annual events in existing website. All these child portals should be migrated to the new website. New template should be maintained uniformly for all the child portals. Further migration of all the data/contents from the child portals of the existing website to the child portal of the new website will be the responsibility of the bidder.
50. Search facility is to be provided in the new website. The search feature should be able to search both HTML pages and documents, such as PDF files and Microsoft Word documents.
51. Indian map with the provision for marking of all the offices, as and when they come up, with address and contact details in the form of popup on mouse over is to be developed and implemented in the new website.
52. New website is to be integrated with Google Analytics.
53. Data Analysis (Dashboards - page wise, traffic wise and others) is to be implemented in the new website.
54. IAI's security integrator will audit the websites and provide the penetration testing and vulnerability assessment report to the bidder. The bidder shall fix/rectify all the issues reported by the auditor within given timelines.
55. The mobile apps should provide an update feature in case of newly published version.
56. Quality Control requirements
 - a. W3C compliance 508 priority 1.
 - b. OS/ SQL/ System config., optimization with error capturing, client side validation of all fields
 - c. Load testing by using win runner / win loader by simulating 10,000 users
 - d. Regular Auditing will be done by the bidder on monthly basis (for one year) on risk mitigation on DR, code addition, malware and related threats. An audit report shall be made available through automated mechanism on the number of updations made by any user / administrator between two dates. The audit report will differentiate between deletion, addition and modification.
 - e. HTTPS communication channel to prevent data leakage and maintain information integrity and privacy.
 - f. The application should support predefined security configuration to protect website resources and data against any attacks (i.e. SQL Injections, XSRF attacks, DOS/DDOS etc.). The bidder will have ready infrastructure / mechanism to negate /counter any possible cyber attacks.
 - g. Existing and new features are required to be implemented in new website in workable and complete form. (For Ex. Optimistic Navigation, Site Map, Collaborative Calendar (IAI Community/ IAI events), Auto Archives of events, contents, Flash images to be changed on monthly, Dynamic Organisation Structure etc.
 - h. The application should support predefined security configuration to protect website resources and data against any attacks (i.e. Session Hijacking, SQL

Injections, XSRF attacks, Cross Site Scripting attack, DDOS and most common forms of hacking or causes for the system to go down etc.)

- i. The bidder will provide alerts and reports that will have data about any attempts to maliciously get control of the site or any of its modules without any mistake made by the users of the system. The system will have the standard security protocols in place which includes “https” for encrypting “Data in Motion”, strong password policy for admin, service accounts and server administrators.
- j. The solution should enforce network level security, traffic to be encrypted using secured connectivity.
- k. The website must be compliant with WCAG (Web Content Accessibility Guidelines) 2.0, Open Web Application Security Project (OWASP) framework, CERT-IN, RBI, Ministry of Finance, IT Act 2008 including its amendments time to time.
- l. The complete solution should be capable of being deployed on a public/private cloud and must support virtualization.
- m. The modules as given below will be developed and implemented in a phased manner.
- n. Each module will be tested with proper test cases and user acceptance will be taken from stakeholders, before go live.
- o. During the course of development if any new features/Modules required either due to statutory requirement or business requirement, same should be provided for.

57. SCOPE OF WORK – (Module Wise)

* W – Required in Website

M – Required in Mobile

	ACET Module (Entrance Exam) (W/M)	<ul style="list-style-type: none">• Criteria/ eligibility check• Online submission of registration form• Upload of documents online• Master (exam centre's etc.)• Uploading of photo(s) with logs• Online Payment of fees• Email/ SMS communication• Login module to download exam material, hall ticket, view profile data, edit photo etc.• Verification of photo(s) uploaded by user(s)• Generating photos in soft copy format (image file)• Generation of Hall ticket• Downloading of Hall ticket• Marks Uploading with history• Maker and checker• Exam Result Declaration• Maintain CPD credits for ACET• QP creation and storage by examiners with logs• Vendor details (name, address, bank account details etc)• Logs• Migration of old data• Report Generation
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	Admission Module (W)	<ul style="list-style-type: none"> • Online submission of admission registration form for below routes:- <ol style="list-style-type: none"> 1. ACET, 2. Non-ACET (offline & online) 3. MRA/Affiliate 4. Honorary Fellows • Admission category should be flexible (addition/ deletion) • Change of category module • OTP feature • Criteria/ eligibility check • Masters to populate various data in the form • Uploading of photo, certificates, documents etc. • Online payment of fees • Email/ SMS communication • Module to re-upload photo, certificates etc. • Verification of photo(s), certificates uploaded by user(s) • Verification of certificates -hard copy and soft copy • Generation of admission confirmation letter and default login credentials/ rejection letter • Maker and checker • Destruction module • Institute ID card issue • Downloading of admission confirmation letter. • Vendor details (name, address, bank account details etc) • Logs • Migration of old data • Report Generation
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	Subscription Module (Post admission) – For regular members (W/M)	<ul style="list-style-type: none"> • Subscription renewal based on financial year basis • Criteria/ eligibility check • Masters to populate various data in the form • Subscription Fees (country wise) • Calculation of subscription fees (arrears, penalty, reduce rate, life membership etc) • For other category check if subscription paid for other Institute. • Payment Mode – Online and Offline • Uploading of documents • Logs to track subscription history • Module to make offline payment transactions • Suspension/ Discontinuation/ Expired membership details • Destruction module • Maker and checker • Logs • Email/ SMS communication • Migration of old data • Report Generation
	Study Material Module (Post admission) – For regular members (W/M)	<ul style="list-style-type: none"> • Criteria/ eligibility check • Masters to populate various data in the form • Splitting/ Merging of subjects (flexible) • Study material – Compulsory & optional • Study Material format - soft copy and hard copy • Online payment of fees • Module to track requests for soft and hard copy related transactions • Maintain and track hard copy study material request • Maintain and track hard copy courier status (Domestic and International) • Inventory management • Hard copy printing – vendor bill checking • Delivery type - post and courier • Delivery status • Email/ SMS communication of dispatch transactions to members • Download option for soft copy study material (non-sharable/transferable) • CT9 subject study material exe format with expiry date (should work on all OS platforms) • Study Material Royalty Module • Maker and checker • Logs • Migration of old data • Report Generation

	Examination Module (Post admission) – For regular members (W/M)	<ul style="list-style-type: none"> • Criteria/ eligibility check. • Master (exam diet, exam fees, exam centre's etc.) • Members category master for becoming associate/ affiliate/ fellow (flexible) • Online submission of exam registration form • Uploading of documents • Online Payment of fees • Email/ SMS communication • Under login module to download exam hall ticket, change exam centre etc. • Generation of Hall ticket • Downloading of Hall ticket • Generation of Codes • Grade calculation on uploading of exam marks (excel document) with examiners details • Exam Result Declaration with history and version • Maintain CPD credits for exam activities • Destruction module • Maker and checker • Logs • Vendor details (name, address, bank account details etc) • Copying case history • Examination Rules Master • Honorarium to Examiners/Centre's • Marksheet upload by examiners • Stock maintenance of Exam Material • Examiner Approval System • Examiner Seminar attendance • Mapping of transition arrangements • Meeting details • Migration of old data • Report Generation
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	Exemption Module (W)	<ul style="list-style-type: none"> • Criteria/ eligibility check • Masters to populate various data in the form • Online submission of exemption form • Uploading of documents, certificates etc. • Online Payment of fees • Email/ SMS communication • Approval Workflow • Generation of Exemption Letter • Downloading of Exemption Letter • Exam credit to members • Destruction module • Maker and checker • Logs • Migration of old data • Report Generation
	ID Card Module (W/M)	<ul style="list-style-type: none"> • Criteria/ eligibility check • Masters to populate various data in the form • Category - Revalidate/ Loss • Online submission of form • Uploading of documents etc. • Online Payment of fees • Email/ SMS communication • Approval Workflow • Maker and checker • Logs • Vendor details storage • Migration of old data • Report Generation
	Additional Exam Modules	<ul style="list-style-type: none"> • Associateship /Fellowship Module • CA2/CA3/CT9/ST9 subjects Module • Counseling/ Coaching module • Discussion Forum Module • Examiner Marking Module • Auto generation of CAT/DAT/Promotion certificates
	Data Maintenance	<ul style="list-style-type: none"> • Change of Name/ Change of Name format (Name history) • Type of work (employee/ proprietor/ partnership/ consultant) • Members profile data updation. • Data updating reminders. • Logs/ history • Migration of old data.(All data of examination module is in excel) • Report Generation

	<p>Seminar Module – For regular members and outsiders. (W/M)</p>	<ul style="list-style-type: none"> • Criteria/ eligibility check • Masters to populate various data in the form • Online submission of seminar registration form (invoice with signature) • Individual and Group registrations allowed • Members/ Non-members registrations. • Complimentary registrations • Replacement provision • Dummy credentials to check the system before generating any letters, making module live etc. • Generate attendance sheet for seminars • Generate CPD/ Attendance letters for seminars • Maintain CPD credits for members/ complimentary members seminar-wise • Invoice and receipt module (offline) • Payment Mode – Online and Offline • Module to maintain offline payment transactions • Global Conference of Actuaries (GCA website and module) • Automated Email system with design/template for announcements and reminders. • Email/ SMS communication • Migration of old data • Maker and checker • Logs • Discussion Forum • Report Generation
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	Online Video Module (Seminars) (W/M)	<ul style="list-style-type: none"> • Criteria/ eligibility check • Masters to populate various data in the form • Online submission of video registration form • Complimentary registrations • Calculation of fees • Online Payment of fees • Email/ SMS communication • Under login module option to play the video • Uploading & maintaining of videos • Inclusion of questionnaire module with questions and answers(objective based) • Maintain CPD credits for members • Maker and checker • Logs • Migration of old data • Report Generation
	Accounts Module (W)	<ul style="list-style-type: none"> • Reconciliation Process • Reports from data aggregator are taken manually. Need to automate the process. • Updating of Transaction charges. • Service Tax/ GST Bifurcation • Automate all manual process for uploading and downloading. • Bills/ Vouchers / Conveyance Automation • Check Printing Automation • Budgetary planning and variance to be made available in the portal. • Importing of data into Tally • Migration of old data • Maintain CPD credits • Maker and checker • Logs • Reports

	HR and Accounts Module (W)	<ul style="list-style-type: none"> • Integrate Biometric attendance with the HRMS module in the new web application - Employee attendance shall populate in the portal (intranet). • Personalized profile for all employees in HRMS • Internal office announcements, alerts, attachments’. • Automated employees greetings - birthday, anniversary, work completion etc. • Automate leave application process. • Online Appraisal form Submission • Automated generation salary slips and issue Form -16 to employees. • It should enable HR team to calculate salary. • Payroll should happen through the portal • NEFT bank payment format. • Instruments to be deposited in bank. • Deposit & investment module. • Asset – tracking module • All transactions from old software to be migrated to tally. • Reports
	Compliance Module (W/M)	<ul style="list-style-type: none"> • COP Issuance / Renewal module • Public comments module with logs. • Migration of old data • Logs • Reports
	Library Module (W/M)	<ul style="list-style-type: none"> • Criteria/ eligibility check • Masters to populate various data in the form. • Online submission of form. • Inventory of list of books • Request for book(s) to read (copyright only 1 at a time – hard copy/soft copy) • Book made available in soft copy or hard copy. • Soft copy format should not be in downloadable format (non sharable/ non trasferable). • Tracking of books • Email/ SMS communication • Under login module option to play the video. • Migration of old data. • Logs • Report Generation

	Stationery & House Keeping Module (W)	<ul style="list-style-type: none"> • Criteria/ eligibility check • Masters to populate various data in the form. • Allotting & Tracking of inventory department-wise. • Report Generation
	Employment Portal (W/M)	<ul style="list-style-type: none"> • Criteria/ eligibility check • Masters to populate various data in the form. • Members will fill/update their graduation/ post graduation details • Members will fill/update their work experience. • Option to upload CV • Reminder to fill their details. • Employer registration and login portal • Workflow to approve/reject employer registration. • Advance Search engine for employer to search various members as per their criteria selection. • Provision for employer to update their details; provide feedback/suggestions. • Online Payment for employer registration. • Track employer activity • Email/ SMS communication • Logs • Migration of old data • Report Generation
	Inward -outward Module (W)	<ul style="list-style-type: none"> • Keep a track of every single document/ letters entering and going out of the office. It is similar to the Physical Register which most of the organizations use for registering the flow of documents inwards and outwards. • Track the document wherever it moves within or outside office. • Defining the type and category of document so that it becomes easy to filter at the time of searching. • Attaching the photo/scan copy of all the documents which are important should be made possible • The Movement of Document needs to be tracked not only upto the Reception of the Company but also to every single user's desk within the organization. Provision for user to accept or reject the acknowledgement of document in system, which is being handed over by other User in the physical form. This way, it is possible to track which document is lying on which table in real-time. • Report Generation

	Meeting/ Agenda Module (W)	<ul style="list-style-type: none"> • Criteria/ eligibility check • Masters to populate various data in the form. • Categorize, define and submit the meeting/ agenda details in the system. • Track all the meetings/ agendas as required. • Maintain history of all meetings/ agenda in the system. • Logs • Migration of old data. • Report Generation
	Document Management System (DMS) (W)	<ul style="list-style-type: none"> • Store and keep track of all documents in electronic format. • Security and Access Control • User friendly interface. • Indexing and classification • Robust Search Feature for easier retrieval • Search keyword inside the file also. • Versioning feature • Audit trails • Universal format support • Simple updating process • Report Generation
	Vendor Management Module (W)	<ul style="list-style-type: none"> • Centralized Vendor Information Database • Organize vendors for easy review, access and classification • Identify & manage vendor risk • Streamline vendor submittals and manage duplicates with ease • Track pricing • Centralize reporting for better decision making and delivering.

	<p>Research Module (W/M)</p>	<p>I. RESEARCH</p> <ul style="list-style-type: none"> • Announcements • Research park- Meeting point for proposers and undertakers • We are on research job- Research work in progress, topics and members • Publications-Published papers • Live chat/ You talk, we listen • FAQ's <p>II. KNOWLEDGE SHARING</p> <ul style="list-style-type: none"> • I share- To share any knowledge/ information • Ask a question – Posting questions by members • Actuary connect- Interact with an Actuary • Playing ground- Discussion place <p>III. TRAINING</p> <ul style="list-style-type: none"> • Announcements • Book your berth - Registration menu • Teacher's desk- Answering questions by the teacher • My classroom- Discussion by students on topics • FAQ's <p>For training Module:-</p> <ul style="list-style-type: none"> • Criteria/ eligibility check • Masters to populate various data in the form. • Online submission of training registration form. • Subject - wise registration option • Online Payment of fees • Email/ SMS communication • Under login module option to play the video. • Logs • Migration of old data. • Report Generation

	CPD Module (W/M)	<ul style="list-style-type: none"> • Criteria/ eligibility check • Masters to populate various data in the form. • Module will be linked with ACET/ Exam/ Seminar/ Accounts/ Compliance/ Online Video Modules. • Maintain CPD credits for members & non-members • Online entry of cpd data • Maker and checker • Migration of old data. • Report Generation
	Budget Module (W)	<ul style="list-style-type: none"> • Allows each department to prepare a preliminary budget on-line and submit it electronically for approval. • Text comments can be applied at any level. • Approvers can re-route the budget worksheet to the originator for modifications. • Creates multiple versions of the same budget • Displays budget vs. actual data for current and prior years • Capture budgets and forecasts with input forms for profit and loss, balance sheet, cash flow, payroll, capital expenses, revenues, and more. • Advanced workflow, with multi-step approvals, notifications and discussion area. • All reports should be exported to Microsoft Excel or printed as a PDF document
	Online Ticketing System (W/M)	<ul style="list-style-type: none"> • Centralize help desk ticket management – from request creation to resolution • Track and monitor requests in real time • Build pre-defined resolutions in the database for end-users. • Advanced workflow, with multi-step approvals and notifications • Reports • Logs

	Online Election Voting Module (W/M)	<ul style="list-style-type: none"> • Security & Reliability • Single Sign On, Website Integration • Ballot Templates • Ballot Shuffling • Candidate Biographies • Referendum voting • Write-in Votes • Ballot Counter • On-demand paper ballots • Multilingual Ballots • High Delivery Email Reminders • Voter Comments • Email Reporting • Email Solicitation • Ballot Previewing • Comprehensive Reporting • Results Publishing • Archived Results
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58. **Audio, video and graphics:** Pictures, videos, picture slide shows, animated graphs, podcasts, and charts, and other multimedia elements are an integral part of the content that IAI offers. Provision should be made both for hosting such content as part of the platform as well as for embedding such content from sites like Slideshare, Youtube, scribd, Wikipedia, Flickr, Picassaweb etc. on to individual pages.

For multimedia content hosted as part of the platform, particularly for video, compression mechanisms should be provided so that the content is easily playable by visitors.

A link to the content page where we use third party multimedia with their name and style and the name of the Institute if the multimedia is owned, developed, maintained and stored in the Institute's Drives shall be provided.

59. The site under reference to be developed by the bidder i.e. www.actuariesindia.org will be the primary site of the Institute. There are other sites of the Institute such as the domain OR subdomain of the website through which online service to the stakeholders is provided OR any other site like this, which will get a place in the form of link in the primary site i.e. www.actuariesindia.org . The bidder has to make the adequate provisions for this kind of links to be provided in the home page of the (to be) new site with attractive look and feel.

60. Each link / option on the website is to be associated with any of the departments in the Institute. The Institute would appoint website Nodal Officer for each department

and there should be facility in the site for the administrator to give privilege to these Officers for their respective links/options to update at their end. Further there should be a provision to generate a MIS which will show the updations done during a particular period.

Eligibility Criteria for bidder

1. Bidder must have at least 5 years' experience in website and mobile designing and development. Bidder must have implemented applications/websites using ASP.Net technology framework and architecture.
2. Bidder must have experience in developing mobile apps for platforms like iOS, Android and windows phone.
3. Bidder must have developed, installed, tested and commissioned at-least Three (3) similar CMD driven web-sites & mobile app. This must be supported by a copy of client letters.
4. The bidder shall be a company incorporated, registered under the Indian Companies Act, 1956. The bidder may also be Proprietorship firm / Partnership firm /LLP.
5. The bidder should have registered office in India.
6. Bidder should have valid Sales Tax/VAT/GST/Service Tax registration number and incometax registration number (PAN).
7. The bidder should be a profit making company in the previous three financial years.
8. Minimum Average Annual Turnover*{MAAT) for the best two (2) years out of last five {5) financial years of the bidder should minimum be Rs.5Crore.
9. The Bidder must have at least One {1} of the Standard certification issued by any authorized agency and valid as on the originally schedule date of bid opening. (ISO 9001:2015 Quality Management System or CMMI Level 3 / CMMI Level 5 certification). This must be supported by a copy of valid certification.
10. The bidder should never have been black listed by any State or Central Government Department in India and should not quote products from any OEM black listed by any State or Central Government Department in India. If a bidder or any member of the consortium has been barred or blacklisted in any contract with government/state governments. The bid of such bidder will be rejected. This must be supported by submitting a self declaration.

Development Environment Tools & Technologies

Latest versions of technology platforms must be employed.

Sr.No	Particulars	http://www.actuariesindia.org/
1	Operating System	All windows platforms
2	Database	MS-SQL Server
3	Application Development Tools	Visual Studio IDE, Android Studio, SQL Server Management Studio
4	Web Technologies	ASP.NET MVC & Web API 5.0
5	Caching (Server-Side)	Redis or similar (OSS)
6	Services & Jobs	Windows compliant services and Scheduled tasks
7	Language	C, C++, C#, HTML, ASP.NET, VB.NET / Javascript etc.
8	Browser	Cross Browser Compatibility
9	Mobile devices	Html5, CSS3, XML
10	Client Side Technologies	ES5 or ES6 standards for scripting with Twitter Bootstrap 3 with SCSS and LESS for theming

Terms & Conditions:

1. Earnest Money Deposit (EMD) and Tender Fee

- i. Bid should accompany an Earnest Money Deposit (EMD) of **Rs 1,00,000/- (Rupees One Lakh only) and tender fee** in the form of a Demand Draft of any scheduled nationalized / commercial bank drawn in favor of **'The Institute of Actuaries of India'**, payable at 'Mumbai'. Cheques, Money orders, Cash or Bank Guarantee etc shall not be accepted as EMD. The bidder's are requested to make sure to indicate the bid number, name and address of the bidder on the reverse of EMD draft and any failure to comply with the same shall be at the risk of the bidder. The quotation not accompanied with earnest money and tender fee shall not be entertained.
- ii. The earnest money of unsuccessful bidder will be refunded without any interest/bank commission/collection charges within 60 days, after the order has been issued in favor of successful bidder.
- iii. The earnest money of successful bidder will be refunded without any interest/bank commission/collection charges after submission of Security Deposit.
- iv. Bidders are required to submit Tender Fee and EMD as applicable, as per tender documents while submitting the bids separately. The Demand draft for Tender Fee and EMD should be drawn in favour of Institute of Actuaries of India, payable at Mumbai.

2. The sealed quotations must be submitted in prescribed format on your business letter head duly stamped, sequentially numbered and signed by the authorized signatory of

the bidder with date on each page of Part 'A','B' & 'C' as their unconditional acceptance of all terms and conditions prescribed by the Institute. Details /supporting documents wherever applicable, if attached with the quotation should be duly authenticated by the bidder/s. Unsigned and unstamped bids shall be summarily rejected. Non acceptance of any of the terms & conditions as stated in tender document shall render the Bid invalid.

3. Bidder should take care to avoid corrections/erasures in the tender offer. Corrections/erasures, if any, made in the tender have to be authenticated by full signature with official seal of the tendering firm.

The bid should be properly indexed and with proper binding as one volume, it should not comprise of loose papers, in case of a failure the bid is liable to be rejected.

4. Each Tenderer shall submit the offer (***Hard Copy along with electronic copy on a CD-ROM/USB Drive***) in two separate sealed envelopes:

Envelop No. 1 will contain Part 'A' & 'B' along with EMD and Tender Fee, Please mark the envelope as

"Envelop No.1 – Technical Bid"

Envelop No. 2 will contain **only** Part 'C', Please mark the Envelope as **"No.2 – Financial Bid"**.

Both the sealed envelopes bearing No. 1 and 2 are to be put in the main envelop i.e. Envelop No.3.

5. The sealed quotation duly super-scribed, "**Development of website and mobile app (www.actuariesindia.org) due on 25/04/2017 by 3.00 P.M**", should be addressed by name to the Executive Director, and sent at the Institute's address given below either by registered post/speed post/or by dropping in the tender box placed at 3rd floor of Institute's Head Office & should reach on or before 25/04/2017 **by 3.00 P.M** .

Address:

The Executive Director

302, Indian Globe Chambers,
142, Fort Street, Off D N Road,
Mumbai - 400 001

At any time prior to the last date for receipt of Bids, the IAI, may, for any reason, whether at its own initiative or in response to a clarification requested by the Bidders, modify the Tender by issuing an addendum/corrigendum. Any such amendment issued along with the original Tender document will constitute Revised Tender. The addendum/corrigendum will be uploaded on the IAI website. The Bidders are requested to visit the website frequently to check for any such decision of IAI on the need for any

modification shall be final and binding on all. In order to afford prospective bidders reasonable time to take the Corrigendum into account in preparing their bids, IAI may, at its discretion, extend the deadline for submission of bids. Any Corrigendum, Clarifications etc shall be binding on the Bidders and shall be given due consideration by them while they submit their bids. IAI may at any time during the Tendering process but before opening the technical/commercial bid request the Bidders to submit revised Technical / Commercial Bids and/or Supplementary Commercial Bids, in case of change in Scope of Work, without thereby incurring any liability to the affected Bidder or Bidders.

6. Outsourcing / subcontracting of work will not be permissible in any form. The selected bidder after the award of the contract, pursuant to this RFP shall not subcontract, transfer, or assign any portion of the contract and if awarded a contract pursuant to this RFP, the selected vendor shall be the solely and wholly responsible to perform the work. Subcontracting/outsourcing will lead to termination of contract and forfeiture of Performance Guarantee. In case of such unavoidable circumstances, the audit firm/company has to take prior written permission from Department of Information Technology, Government of N.C.T. of Delhi for engaging such agency or individual.
7. Quotations received after the stipulated date and time shall not be entertained. The Institute shall not be liable for any postal delays what so ever and quotation received after the stipulated time/date are liable to be rejected summarily without giving any reason.

No binding legal relationship will exist between any of the Bidders and IAI until execution of a contractual agreement.

8. The **Technical Bid** shall be opened on **26 /04 /2017 by 11.00 a.m** in the Institute at 302, Indian Globe Chambers, 142, Fort Street, Off D N Road, Mumbai - 400 001 in the presence of those tenderer(s) who wish to be present. No separate communication will be sent in this regard. In the event of due date being a closed holiday or declared Holiday for Central Government offices, the due date for opening of the bids will be the following working day at the appointed date, time & venue.
9. Incomplete quotations shall be rejected out rightly. No alterations, amendments or modifications shall be made by the Bidder in the tender documents and if any such alterations are made or any special conditions attached, the bid is liable to be rejected at the discretion of the IAI without reference to the bidder. Please note that all the information as desired needs to be provided. Incomplete information may lead to rejection of Bid.
10. The Bids which does not fulfill any of the conditions or the notified requirements, directions & guidelines laid down by IAI shall be considered to be incomplete and are likely to be rejected without assigning any reason thereof.
11. IAI in its sole discretion and at any time during the processing of Bids, may disqualify any

bidder from the bid process, if the bidder has:

- a. Firms not meeting eligibility criteria.
- b. Submitted the Proposal documents after the scheduled date and time;
- c. Exhibited a record of poor performance such as abandoning works, not properly completing the contractual obligations, inordinately delaying completion or financial failures, etc. in any project in the preceding three years;
- d. Submitted a proposal that is not accompanied by required documentation or is nonresponsive;
- e. Failed to provide clarifications related thereto, when sought;
- f. Submitted more than one Proposal;
- g. Declared ineligible by the Government of India/State/UT Government for corrupt and fraudulent practices or blacklisted.
- h. Submitted a proposal with price adjustment/variation provision.

If found to have record of poor performance such as abandoning works, not properly completing the contract, inordinately delaying completion, being involved in litigation or financial failures.

- 12.** During evaluation of the bids, the IAI may at its discretion, ask the Bidder for clarification of its bid and the same has to be provided within the time period minimum one day as specified by IAI and in case of a default it will be deemed that bidder has no clarification to submit and the bid is liable to be evaluated and/or rejected accordingly. The request for clarification and the response shall be in writing and no change in clarification submission date, price or substance of the bid shall be sought, offered or permitted.
- 13.** IAI shall have the right to assess the competencies and capabilities of the Tenderer by going through the credentials given in the Technical Bid and on the basis of such credentials, IAI may reject the candidature of the Tenderer without assigning any reason. In such case(s) the Financial Bid shall not be opened for that particular Tenderer. The IAI reserves the right to accept or reject any or all bids without assigning any reason whatsoever and decision of the Institute shall be final.
- 14.** IAI reserves the right of accepting the tender in whole or in part without assigning any reason and such decision shall be final. The part acceptance of the tender shall not violate the terms and conditions of the Tender / contract and the bidder shall execute the work at the specified rates without any extra charges or compensation within the stipulated period.
- 15.** The acceptance of a Bid shall rest with the IAI. IAI does not bind itself to accept the lowest tender and reserves to itself the right to reject any or all the bids received without assigning any reason(s) whatsoever and any notice to bidder. Non acceptance of any Bid shall not make the IAI liable for compensation or damages of any kind. IAI further reserves the right to accept a bid other than the lowest or to annul the entire bidding process with or without notice or reasons. Such decisions by IAI shall be final and bear no liability whatsoever consequent upon such decisions.

16. IAI will open the financial bids of only those bidders, who have been found to be eligible and technically qualified. Technical evaluation will be done by a Committee and will include the compliance of eligibility criteria as per the terms and conditions of the RFP, surprise visits/ testing & benchmarking/ presentation by the firm etc.
17. The date and time of opening of financial bids shall be informed separately only to the qualified bidder.
18. Prices quoted should be FOR Institute premises (IAI) Head Office Mumbai and should be inclusive of all charges/taxes. Prices quoted in the bid shall expressly be inclusive of all statutory taxes, GST, fees, cesses, duties, levies, charges, surcharges inclusive of all statutory and any other components (net to IAI).
19. This Tender does not commit IAI to award a contract. Further, no reimbursable cost may be incurred in anticipation of award.
20. The quotation shall be valid for at least 90 days from the date of opening of quotations.
21. **Warranty/AMC**

Standards Warranty/AMC terms for supplied software/apps shall include free maintenance of the software/apps as mentioned under the heading "Scope / deliverables" in this RFP. The defects, if any shall be attended to within 4 (four) working hours and must be resolved within maximum 24 hours.
22. The successful Tenderer shall be required to execute a Service Level Agreement (SLA) on the basis of the tender terms. The said Agreement shall form an integral part of this tender and shall be signed within 20 (twenty) days of the award of the contract. The service charges payable under the said SLA shall however be fixed and firm till the completion of the warranty period.
23. The Institute may like to extend the maintenance contract further on the basis of the quoted commercials.
24.
 - a) The tenderor(s) are required to study the Institute's website(s) and complete set-up while quoting for the development and maintenance charges for the same.
 - b) The selected bidder shall be required to depute at least one coordinator cum developer on full-time basis at Institute's office at Mumbai to coordinate for the Development Activities. He/She will adhere to the office discipline of the Institute till successful implementation and acceptance of all deliverables. He / She will be provided only seating space and the permission to use the network of the Institute. Other infrastructure like computer is to be provisioned for by the bidder. Such coordinator cum developer shall be on the rolls of bidder only and his/her association with the Institute shall be only to facilitate the Design, Development, Implementation, Deployment & Maintenance activities smoothly as undertaken by

the bidder. The bidder will be responsible for the trouble free integrated working of the application, OS, hardware, software and networking.

- c) Escalation matrix up to the level of CEO must be provided with phone number and email address of all personnel in the matrix.

- 25.** Penalty of @Rs.1000/- (Rupees Five hundred only) per day or part thereof shall be levied for the defaulted days in case of not meeting any of terms and conditions mentioned in this RFP. All such penalties shall be limited to 10% of the contract value and may be recovered from the payments dues or the security amount / Bank Guarantee / EMD of the bidder firm.

26. Security Deposit

The tenderer whose tender is accepted by IAI shall be required to give a security deposit for faithful performance of the tender. The total amount of security deposit shall be 5% of the total contract value. No interest will be payable by IAI on the security deposit, so held. Security deposit shall be provided by the tenderer through an irrecoverable Bank Guarantee from any Nationalized Bank in favor of the Institute of Actuaries of India. The Bank Guarantee shall be valid for a period of two years and shall be submitted within 10(ten) days of the award of work/ SLA is executed.

- 27.** In case of contravention of the various terms and conditions as stated in the tender documents and SLA, the IAI shall have the right to invoke the said Bank Guarantee/ security amount. No interest will be payable by IAI on the security deposit, so held.

- 28.** Contract Period: The period of the contract shall be initially for a period of **Two years** (Design, Development, Implementation & Deployment of Website & Mobile App within a period of one year) + (maintenance of website and mobile application within the warranty period of one year) as given in the Service Level Agreement. After the initial term, the SLA may be renewed each year for an additional twelve (12) month period as per mutual understanding between Service Provider and IAI.

- 29.** There will be a pre-bid meeting on 18/04/2017 at 12:00 (Noon) in IAI- Mumbai **office** located at 302, Indian Globe Chambers, 142, Fort Street, Off D N Road, Mumbai - 400 001 to clarify the queries of the interested bidders.

30. Delivery Period

The design, development, implementation & deployment of Website & Mobile App will have to be completed within 1 **(One) year** from the date of the purchase or work order. However bidder may like to mention the exact delivery period in the bid. Any delay by the Tenderer from the committed dates in the delivery of items shall render the Tenderer liable to any or all of the sanctions viz. penalty, invocation of Bank Guarantee / forfeiture of security deposit, imposition of liquidated damage, etc.

- 31.** The bidder shall bear all costs associated with the preparation and submission of its bid,

and IAI will in no case be responsible or liable for these costs, regardless of the conduct or the outcome of the bidding process.

32. The bidder is expected and deemed to have read, examined/ perused, complied/ agreed to all instructions, forms, terms and specifications etc in the tender document while bidding. Failure to furnish all information required and/or False/Incorrect information and/or ambiguous/ irrelevant information and/or submission of bid not substantially responsive to the bidding documents in every respect will be at the Bidders risk and may result in rejection of its bid.

33. Liquidated Damage: Penalty for the delay in completion of work would be levied at the rate of half percent per week subject to a maximum of 10 percent of the value of the order as has not been completed during the stipulated period. In case of delay beyond fifteen days from the stipulated period, Institute may at its discretion cancel the order and arrange to assign the same to the next bidder on the panel/open market at the sole risk, cost and responsibility of the bidder.

34. Work Location: 302, Indian Globe Chambers, off DN Road. 142 Fort Street, Mumbai 400001 or any other place as communicated.

35. Terms of Payment

- I. No advance payment shall be made.
- II. Payments shall be subject to deductions of any amount for which the Bidder is liable under the agreement against this contract. Further, all payments shall be made subject to deduction of TDS (Tax deduction at Source) as per the prevailing income- Tax Act and any other taxes as on the date of invoice submission and/or payment date, whichever is higher.
- III. All Payments shall be made in Indian Rupees only.
- IV. **Payment Schedule will be as under :-**

#	Slab	Description
1.	25%	25% of the amount mentioned in sr. no. 1 of commercial bid after successful UAT of 10 modules along with handover of source code, manuals, users training etc.
2.	25%	Further 25% after successful UAT of 10 more modules along with handover of source code, manuals, users training etc.
3.	40%	40% after successful UAT of all balance modules, publishing of mobile app on mobile store along with handover of source code, manuals, users training etc.
4.	10%	Balance 10% at the end of the warranty period.

- Payment for specific items as per sr. no. 3 of financial proposal will be made at the end of 30 days after the ownership gets transferred in the name of IAI.

- Yearly AMC amount will be paid at the end of each AMC year.

36. Any dispute, difference, controversy or claim (“Dispute”) arising between the Parties out of or in relation to or in connection with this tender, or the breach, termination, effect, validity, interpretation or application of this tender or as to their rights, duties or liabilities hereunder, shall be addressed for mutual resolution by the authorised official of the parties. If, for any reason, such Dispute cannot be resolved amicably by the Parties, the same shall be referred to the sole arbitration of the President, The Institute of Actuaries of India or any other person appointed by him as Sole Arbitrator. The provisions of the Arbitration and Conciliation Act, 1996 or any statutory modifications on re-enactment thereof as in force will be applicable to the arbitration proceedings. The venue of the arbitration shall be at Mumbai. The cost of the Arbitration proceedings shall be shared equally by both the parties. The language of the arbitration and the award shall be English. The decision / award of the arbitrator shall be final and binding.

37. The quantities indicated in Part “C” are tentative and may be increased/decreased at the sole discretion of the Institute and the bidder shall have not right to claim any minimum/definite volume of business.

38. That it is expressly understood and made clear to the Bidder that its employees, staff, agents, representatives etc. or by any other person directly or indirectly employed by him shall not be employee / officer of the IAI for any purpose and in no case, there will be any relationship of Employer & Employee, implicitly or explicitly between IAI and Bidder or its employees, staff, agents, representatives etc. or by any other person directly or indirectly employed by him. In case any work for which there is no specification in the tender but the same is essential for the job / work mentioned in tender document, such work shall be carried out in accordance with the directions of the IAI without any extra cost to the Institute.

39. Technical Evaluation Criteria:

- a. Bidders will be evaluated on the basis of ‘Minimum Eligibility Criteria’ and those who qualify greater than or equal to 75 marks will only be considered for opening of financial bids.

Refer to Technical Bid Form for more details.

40. Commercial Evaluation Criteria:

- a. The Commercial evaluation will be done on the basis of the new website cost + mobile app cost + Any Other Specific items required to complete the exercise including software license(s) cost involved + 3 years AMC cost (After Warranty period).
- b. Bidders qualified after Techno-Commercial evaluation shall be notified of

financial bid opening date & time. Representative of qualified bidders desirous of attending the financial bid opening may join the same at scheduled date and time at IAI office.

Refer to Commercial Bid Form for more details.

- ii The Bid security / EMD may be forfeited either in full or in part, at the discretion of IAI on account of one or more of the following reasons:
 - i) The BIDDER fails to co-operate in the Bid evaluation process
 - ii) If the bid or its submission is not in conformity with the instruction mentioned herein
 - iii) If the BIDDER violates any of the provisions of the terms and conditions of the tender
 - iv) In the case of a successful Bidder fails to
 - (a) Accept award of work
 - (b) Sign the Contract Agreement with IAI after acceptance of communication on placement of award
 - (c) Furnish performance security
 - (d) Sign the Contract Agreement in time
 - (e) or the Bidder indulges in any such activities as would jeopardize the interest of IAI in timely finalization of this tender.
 - v) The bidder found guilty of negligence, carelessness, inefficiency, fraud, mischief, misappropriation or any other type of misconduct by such bidder or by its employees, staff, agents, representatives etc or by any other person directly or indirectly employed by him.

The decision of IAI regarding forfeiture of bid security shall be final and shall not be called upon question under any circumstances. A default in such a case may involve black-listing of the BIDDER by IAI.

Standard Terms and Conditions applicable for this tender, if not mentioned above

1. Forfeiture of Security Deposit and Invoking of Bank Guarantee

IAI shall have the right to invoke the Bank Guarantee and to forfeit the security deposit if Service Provider contravene or breach any of the terms and conditions of this Service Level Agreement (SLA) or if the Service Provider withdraws or amends, impairs or derogates from Work Order / Service Level Agreement (SLA) or fails to execute the work as per the Work Order / Service Level Agreement (SLA) or fails to deliver the satisfactory performance during the period of contract.

IAI shall also have the right to invoke the Bank Guarantee and to forfeit the security deposit and to adjust the damage or loss caused to the IAI due to the negligence, carelessness, inefficiency, fraud, mischief and misappropriation or any other type of misconduct of the Service Provider or its staff / employee / agent / representative.

Whenever under *Work Order / Service Level Agreement (SLA)* order any sum of money is recoverable from and payable by the Service Provider, the IAI shall have right to recover such sum by appropriating in part or in whole from the security deposit / bank guarantee of the Service Provider. In the event of the security deposit / bank guarantee being insufficient, the balance or the total sum recoverable, as may be, shall be deducted from any sum due to the Service Provider or which at any time thereafter may become due to the Service Provider under this or any other agreement with the IAI. If this sum is not sufficient to cover the full amount recoverable, the Service Provider shall pay the Institute on demand the remaining amount.

2. Compliances of Law

“A. Service Provider shall carry out the Services in strict compliance with all relevant laws and regulations of the State or Territory within India where the Services are being rendered and in accordance with the conditions of any permit, license or concession relating to any part of the Services, whether held by Service Provider, IAI or any other concerned party.

B. Service Provider shall indemnify and hold IAI harmless from and against any liability, penalty, cost or expense suffered or incurred as a result of Service Provider failing to comply with any law, or regulation, or such permit or license relating to any part of the Services.”

3. Payment of Taxes

A. Service Provider shall be responsible for and shall pay all taxes, duties, excises, assessments or other charges of any kind or nature whatsoever levied by any

government or governmental body on or in connection with the Services including without limitation sales taxes, duties, customs, levies, service tax and any other tax ("taxes") levied on the equipment, supplies and any other item/service supplied by Service Provider. IAI may withhold from payments due to Service Provider any amounts required with respect to the aforementioned taxes and to remit the same with the relevant authorities, in case of failure on the part of Service Provider.

4. Intellectual Property Rights

Service Provider shall ensure that it holds all necessary patents, licence rights and other proprietary rights required in respect of any device or method used by it while conducting the Services. Service Provider shall indemnify and hold IAI harmless from and against any liability, penalty, cost or expense suffered or incurred as a result of Service Provider failing to comply with this obligation.

5. Indemnity

a. Service Provider shall be solely liable for and shall indemnify IAI, its officers, servants, employees and agents against all liabilities, losses, claims and expenses of any nature whatsoever arising from any personal injury or illness (including death) of any nature whatsoever and any penalty, loss, damage or destruction to any property whether real or personal where such liability arises out of or in connection with the conduct of the Services whether under common law, under statute or otherwise. The Service Provider further covenants and agrees to indemnify and keep at all times indemnified the IAI against any loss or damage that the IAI may sustain directly or indirectly as a result of the failure or negligence of the Service Provider or its employees to faithfully carry out its obligations under this agreement and further to pay for all losses, damages, costs, charges and expenses which the IAI may reasonably incur or suffer and to indemnify and keep indemnified the IAI in all respects.

b. The indemnifying party shall be granted immediate and complete control of any claim of indemnity and the indemnified party shall not prejudice the indemnifying party's defence of the claim.

c. The indemnified party shall give the indemnifying party all reasonable assistance at the expense of the indemnifying party on such claim of indemnity.

6. FORCE MAJEURE

The Parties shall not be liable for any failure to perform, any of its obligations under this Agreement if the performance is prevented, hindered or delayed by a Force Majeure event (defined below) and in such case its obligations shall be suspended for so long as the Force Majeure Event continues. Each party shall promptly inform the other of the existence of a Force Majeure Event and shall consult together to find a mutually acceptable solution.

"Force Majeure Event" means any event due to any cause beyond the reasonable control of the Party, including, without limitation, unavailability of any communication system, sabotage, fire, flood, explosion, acts of God, civil commotion, strikes or industrial action of any kind, riots, insurrection, war or acts of government.

7. Confidentiality of Information

- a. During the term of this Agreement and thereafter, any disclosing party's Confidential Information received by the receiving party, under and by virtue of this Agreement, shall be maintained in the strictest confidence and trust and shall not be disclosed to a third party without the prior written consent of the disclosing party, unless such information is required to be disclosed in pursuance of the order of a competent court, tribunal or other regulatory authority exercising valid jurisdiction, in which case the party required to make the disclosure shall promptly notify the other Party in writing of such disclosure. For purposes of this agreement "Confidential Information" means information that: (i) is sufficiently secret to derive economic value, actual or potential, from not being generally known to other persons who can obtain economic value from its disclosure or use; and / or (ii) is the subject of efforts that are reasonable under the circumstances to maintain its secrecy or confidentiality.
- b. Any software / hardware material, product specifications, financial information, documents covered under this agreement shall be confidential information and deemed to be in private domain and it shall not be made public or shared with any other party without the prior written consent of the IAI. All such information/material shall be treated as confidential for a minimum period of two years after this agreement comes to an end or as agreed from time to time.
- c. Provided that upon the expiration, cancellation, or termination of this Agreement, each party shall, upon the written request of the other party, return or destroy, to the satisfaction of the other Party, all Confidential Information, documents, manuals and other materials specified by the other Party.
- d. Service provider shall sign Non-Disclosure Agreement with the IAI for confidentiality of the data and information/records of the IAI.

8. Genuine Software

Both parties agree that the software that is required to be used for the purposes as envisaged under this Agreement shall be genuine and registered software and not a pirated version of any nature.

9. Termination

Either party may terminate this Agreement by giving a two months' notice in writing to the other party for termination of agreement.

The IAI without prejudice to any other remedy, reserves the right to terminate the agreement in whole or in part by giving one month notice in writing in case Service Provider fails to discharge its obligation under this agreement without sufficient grounds

or found guilty for breach of condition(s) of the agreement, negligence, carelessness, inefficiency, fraud, mischief and misappropriation or any other type of misconduct by Service Provider or by its staff or agent or in case there are more than two penalties on the Service Provider in any month.

Any pending or unresolved operational issues, performance, unpaid fees and any other remedies shall continue by the Service Provider during the period of termination notice and the same must be satisfied before this agreement is terminated. The IAI may also put in place any other agency for carrying out the remaining work and expenditure incurred on same shall be recovered from the Service Provider.

The Service Provider shall have no claim to any payment or compensation whatsoever on account of any profit or advantage, which would have been derived from the performance of this agreement in full, but which he did not derive in consequences of the full performance of this agreement not having been carried out, nor shall he have any claim for compensation / damage for the loss suffered by him by reason of termination of agreement by the IAI. No claim for interest will be entertained by IAI with respect to any moneys or balances, which may be in its hands owing to a dispute between itself and the Service Provider.

10. Blacklisting

The IAI may by notice in writing blacklist the Service Provider for suitable period in case Service Provider fails to discharge its obligation under this agreement without sufficient grounds or found guilty for breach of condition(s) of the agreement, negligence, carelessness, inefficiency, fraud, mischief and misappropriation or any other type of misconduct by Service Provider or by its staff or agent or in case there are more than two penalties on the Service Provider in any month.

11. Governing Law

The Agreement shall be interpreted in accordance with and governed by the laws of India.

12. Dispute Resolution:

Any dispute, difference, controversy or claim ("Dispute") arising between the Parties out of or in relation to or in connection with this Agreement, or the breach, termination, effect, validity, interpretation or application of this Agreement or as to their rights, duties or liabilities hereunder, shall be addressed for mutual resolution by the authorised official of the parties. If, for any reason, such Dispute cannot be resolved amicably by the Parties, the same shall be referred to the sole arbitration of the President of the Institute of Actuaries of India or any other person appointed by him as Sole Arbitrator. The provisions of the Arbitration and Conciliation Act, 1996 or any statutory modifications on re-enactment thereof as in force will be applicable to the arbitration proceedings. The venue of the arbitration shall be at Mumbai. The cost of the Arbitration proceedings shall be shared equally by both the parties. The language of the arbitration and the award shall be English. The decision / award of the arbitrator shall be final and binding.

13. Independent Contract & Relationship between the Parties

The relationship of Service Provider to IAI under this Agreement shall be that of an independent contractor. The acts/performance and actions taken by either party in furtherance of their respective activities of operation shall not bind the other except to the extent provided under this Agreement. The acts performed and action taken by either party that do not fall under the Agreement shall have binding effect on the other to the extent they are reduced to writing and the prior consent of the other party is obtained.

14. Non-Exclusive Agreement

The agreement between the IAI and Service Provider is a non-exclusive agreement. The IAI shall be free to enter into any such agreement with any other service provider during currency or the extended currency of this Agreement.

15. Complete / Entire Agreement:

This Agreement, its Attachments, if any, and the documents specifically referred herein constitute the complete Agreement between the Parties and replace any written or oral Agreement or understanding with respect to the subject matter. Changes, amendments or interpretations of this Agreement shall be valid only if they are in writing and signed by both parties, except that each Party may make a change of domicile or change of the name of the person to whom notifications shall be sent. This notification shall be made through a written document to the other Party to this Agreement.

16. Representations and Warranties

The Parties represent and warrant that they have relevant authority and permission under the applicable laws/ rules/ notifications or by virtue of the order/ instruction/ directive from the relevant authority to enter into this Agreement.

17. Non Waiver:

Failure to exercise by either party of any right under this Agreement in one or more instances shall not constitute a waiver of those rights in another instance. Such waiver by one Party of any of the rights established herein shall not be considered as a waiver of another right established herein. A provision or right under this agreement shall not be waived except in writing signed by the party granting the waiver, or varied except in writing signed by all the parties.

18. Severability

If any provision of this agreement is held invalid, unenforceable or illegal for any reason, this agreement will remain otherwise in full force apart from that provision(s) which shall be deemed deleted.

19. Assignment & Sub-Letting

Neither party shall assign or sub-let any of its rights and obligations hereunder whether in whole or in part without the prior written consent of the other. However, nothing in the foregoing shall be affected in the event of there being a merger, amalgamation or takeover of the business/ management of a party. In such an eventuality all the rights and obligations shall automatically be vested with the entity with which such party has been merged or is taken over.

20. Notices & Notifications:

All notices, notifications, request, consents or other communications required or permitted to be given to either party pursuant to this Agreement shall be in writing and shall be delivered personally or sent by Registered Post with acknowledgement due, Speed post or by courier to the addresses indicated in this Agreement. Any change of Address should be notified to each other.

21. Alteration and Modification

Any alteration or modification or waiver in connection with this agreement will not be effective unless made in writing and signed by both the parties.

22. Headings:

The headings used in this Agreement are for purposes of convenience only and shall not control the language or meaning of the provision following.

23. Precedence:

In the event of any ambiguity or doubt or dispute on the terms and conditions applicable, the order of precedence for the purposes of resolving such ambiguity, doubt or dispute shall be:

- (a) This Agreement
- (b) The Attachments (if any)
- (c) The Purchase / Work Order
- (d) The Offer / RFP / Tender

24. Jurisdiction of Courts:

All disputes arising out of or relating to the Agreement shall be deemed to have arisen in Mumbai and only courts having jurisdiction over Mumbai shall determine the same.

For any details/clarifications, Shri Larry Barretto, Manager – IT and member services on telephone No. 022- 67843306 or email at it@actuariesindia.org.

Part 'B' - Technical Bid Form

Bidders must submit the technical bid in a sealed cover strictly as per the terms specified in the RFP. Bids submitted otherwise will not be accepted.

1. Description of the Approach, Methodology and Work Plan (timelines)

Technical approach, methodology and work plan are key components of the Technical Proposal. You are suggested to present this section of the technical proposal into 4 chapters:-

a) Technical Approach and Methodology

In this chapter you should explain your understanding of the objectives of the assignment, approach to the services, methodology for carrying out the activities and obtaining the expected output, and the degree of detail of such output. You should highlight the problems being addressed and their importance, and explain the technical approach you would adopt to address them. You should also explain the methodologies you propose to adopt and highlight the compatibility of those methodologies with the proposed approach.

b) Work Plan

In this chapter you should propose the main activities of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals by the Client), and delivery dates of the reports. The proposed work plan should be consistent with the technical approach and methodology, showing understanding of the ToR and ability to translate them into a feasible working plan. A list of the final technical documents, including reports, drawings, and tables to be delivered as final output, should be included here.

c) Organization and staffing of the team for this assignment

In this chapter you should propose the structure and composition of your team which will be deployed for this assignment. You should list the main disciplines of the assignment, the key expert responsible and proposed technical and support staff along with their curriculum vitae (CVs).

d) Team composition and tasks assigned. Please provide the details as per the following:

CATEGORY	MAX. POINTS
MANDATORY REQUIREMENTS (PASS OR FAIL)	Pass/Fail
1. OVERALL RESPONSE *Understanding of, and responsiveness to, IAI requirements; *Understanding of scope, objectives and completeness of response; *Overall concord between IAI requirements and the proposal.	(20)
2. METHODOLOGY *Quality of the proposed approach, methodology and system design; *Quality of proposed implementation plan, i.e how the bidder will undertake each task, and time-schedules; *Risk assessment - recognition of the risks/peripheral problems and methods to prevent and manage risks/peripheral problems.	(30)
3. TECHNICAL EXPERTISE * Certifications * Experience in successfully delivering similar Projects. * Experience in executing Web Applications	(30)
4. PROPOSED TEAM and ORGANISATIONAL CAPACITY * Team leader: Relevant experience, qualifications, and position with firm; * Team members - Relevant experience, skills & competencies; * Organization of the team and roles & responsibilities; * Professional expertise, knowledge and experience with similar projects, contracts, clients and consulting assignments;	(20)
TOTAL MARKS	100

Any other details.

Date

Place

Signature

Name.....

Note: True copies of the documents in support of information furnished above must be annexed with the Performa

Part 'C' - Commercial Bid Form

(To be submitted separately with Commercial Bid in a sealed envelope with soft copy in CD/Pen Drive as per terms and conditions)

- Bidders qualified after Techno-Commercial evaluation shall be notified of financial bid opening date & time. Representative of qualified bidders desirous of attending the financial bid opening may join the same at scheduled date and time at IAI office.
- IAI reserves the right to negotiate the offer submitted by the bidder to withdraw certain conditions or to bring down the rates to a reasonable level. The bidder must note that during negotiations of rates of items can only be reduced and not increased by the bidder. In case the bidder introduces any new condition or increases rates of any item, his negotiated offer is liable to be rejected and the original offer shall remain valid and binding on him.

The complete financial proposal consists of the following:

1. Design, Development, Implementation, & Deployment within a period of one year of all modules of the IAI website and mobile app.
 2. One Resident Software Engineer for maintenance/management of website and mobile application within the warranty period of one year.
 3. AMC for three years after completion of Warranty period.
- Evaluation of the bid will be done on the basis of total price (Exhibit - 1) inclusive of all taxes & duties. Contract will be awarded to the bidder, whose commercial offer as per financial proposal in Exhibit - 1) has been determined to be lowest evaluated offer after evaluating the technical offers.
 - Contract may be awarded even if only one bidder qualifies technical/commercial offer. However, IAI reserves the right to take appropriate decisions in such case and shall not be binding on the IAI to award the contract.
 - The format for financial bid proposal is placed below in the Exhibit section.

EXHIBITS

EXHIBIT-1: FORMAT OF THE COVERING LETTER

[The covering letter is to be submitted by the Bidding Entity or the Lead Member of a Bidding Consortium, along with the Technical Bid Form - Printed on their respective Letter Heads]

Date:
Place:

Executive Director
Institute of Actuaries of India

Dear Sir,

Sub: Selection of Bidder for “Design, development, implementation, deployment & maintenance for 2 years of the official website and mobile application of Institute of Actuaries of India”

Please find enclosed one (1) original + two (2) copies of our Bid in respect of the Selection of Bidder for Design, development, implementation, deployment & maintenance for 2 years of the official website and mobile application, in response to the Request for Proposal (RFP) Document issued by of Institute of Actuaries of India dated 10/04/2017.

We hereby confirm the following:

1. The Bid is being submitted by _____ (Name of the Bidding Company / Lead Member of Consortium) who is the Bidding Company / the Lead Member of the Bidding Consortium comprising _____ (mention the names of the entities who are the Consortium Members), in accordance with the conditions stipulated in the RFP (In Case of a Bidding Consortium). Our Bid includes the Letter of Acceptance in the format specified in the RFP.
2. We have examined in detail and have understood the terms and conditions stipulated in the RFP Document issued and in any subsequent communication sent by IAI. We agree and undertake to abide by all these terms and conditions. Our Bid is consistent with all the requirements of submission as stated in the RFP or in any of the subsequent communications from IAI.
3. The information submitted in our Bid is complete, is strictly as per the requirements as stipulated in the RFP, and is correct to the best of our knowledge and understanding. We would be solely responsible for any errors or omissions in our Bid.
4. The Bidding Company / Bidding Consortium of which we are the Lead Member (Please strike out "whichever is not applicable"), satisfies the legal requirements and meets all the eligibility criteria laid down in the RFP.
5. This bid is unconditional and we hereby undertake to abide by the terms and conditions of the RFP.
6. We, as the Bidding Company / Lead Member of Bidding Consortium (Please strike out "whichever is not applicable), designate Mr./Ms. _____ (mention name, designation, contact address, phone no., fax no., etc.), as our Authorized Representative and Signatory who is authorized to perform all tasks including, but not limited to providing information, responding to enquiries, entering into contractual commitments etc. on behalf of the us in respect of the Design, development, implementation, deployment & maintenance for 2

years of the official website and mobile application of Institute of Actuaries of India “. The Board Resolution authorizing the said person is enclosed.

For and on behalf of: (Company Seal)

Signature :

Name :

Designation :

Designated Authorized Representative and Signatory:

Name of the Person :

Designation :

Signature :

EXHIBIT-2: FORMAT OF LETTER OF ACCEPTANCE

Date:

Place:

Executive Director
Institute of Actuaries of India

Dear Sir,

Sub: Selection of Bidder for “Design, development, implementation, deployment & maintenance for 2 years of the official website and mobile application of Institute of Actuaries of India”

This has reference to the Bid being submitted by _____ (mention the name of the Lead Member of the Bidding Consortium), as Lead Member of the Bidding Consortium comprising _____ (mention name(s) of the Consortium Members), in respect of Selection of „Bidder“ for Design, development, implementation, deployment & maintenance for 2 years of the official website and mobile application of Institute of Actuaries of India, in response to the Request for Proposal (RFP) Document issued by the IAI, dated 10/04/2017.

We hereby confirm the following:

- We _____ (Name of the Consortium Members furnishing the Letter of Acceptance), have examined in detail and have understood and satisfied ourselves regarding the contents including in respect of the following:
 - The RFP Document issued by IAI;
 - All subsequent communications between IAI and the Bidder, represented by _____ (Mention name of the Lead Member of Consortium).
 - The MoU signed between / among _____ (Names of the Consortium Members), as members of the Bidding Consortium; and

- The Bid being submitted by _____ (Name of the Lead Member of Consortium).

We have satisfied ourselves regarding our role as (here give a brief description of the role) in the Design, development, implementation, deployment & maintenance for 2 years of the official website and mobile application of "Institute of Actuaries of India" as specified in the Bid. If the Bidding Consortium is awarded the Design, development, implementation, deployment & maintenance for 2 years of the official website and mobile application of Institute of Actuaries of India ", we shall perform our role as outlined in the Bid to the best of our abilities. We have examined the Bid in detail and the commitments made in the same. We agree and undertake to abide by the Bid and the commitments made therein.

We authorize _____(Name of the Lead Member of Consortium), as the Lead Member and authorize the same to perform all tasks including, but not limited to providing information, responding to enquiries, entering into contractual commitments etc. on behalf of the consortium, in respect of this Design, development , implementation, deployment & maintenance for 2 years of the official website and mobile application of Institute of Actuaries of India ".

We understand that, no change in the membership in the Bidding Consortium, in the role and form of responsibility of any Consortium Member shall be permitted after submission of the Bid. After selection, if any change in the equity in the Consortium (whose strengths have been credited for evaluation) is desired, it would need to be communicated to IAI in writing for its approval. IAI would reserve the right to reject such requests for a change of consortium structure, if in its opinion; it would adversely affect the same.

Notwithstanding the above, (In Case of the Lead Member in the Bidding Consortium) we undertake that our equity stake in the Bidding Consortium shall not be less than 51% for the entire period of Contract with IAI, and shall not be less than that of any other Consortium Member in the Bidding Consortium for such period of Lock-in.

For and on behalf of: (Company Seal)

Signature :

Name :

Designation :

Designated Authorized Representative and Signatory:

Name of the Person :

Designation :

Signature :

EXHIBIT-3: PROFORMA OF BANK GUARANTEE FOR BID SECURITY

(To be executed on appropriate value of Non-Judicial Stamp Paper as per Stamp Act prevailing in the State of Maharashtra)

WHEREAS, _____ (Name of the Bidder) wishes to submit his Request for Proposal for the Selection of „Bidder“ for “**Design, development, implementation, deployment & maintenance for 2 years of the official website and mobile application of Institute of Actuaries of India**”, in response to the Request for Proposal (RFP) Document issued by the IAI, dated 10/04/2017. hereinafter called "the Bid".

KNOW ALL MEN by these presents that we _____ (name of bank) of _____ (country) having our registered office at _____ (hereinafter called "the bank") are bound to IAI or its successor, (hereinafter referred to as "IAI ") in the sum of Rs. _____ (Rupees _____ Lakhs only) which payment can truly be made to IAI. The Bank binds themselves, their successors and assigns by these presents.

Now therefore the Bank here by guarantee irrevocably and unconditionally the due payment to IAI upon demand of sum or sums..... one to it occurrence of one or any of the following conditions, specifying the occurred condition or conditions.

Sealed with the Common Seal of the Bank this _____ day of _____ 2017.

THE CONDITIONS of this obligation for invoking the guarantee by IAI are:

- a. If the Bidder withdraws his Bid at any time during the stipulated period of Bid Validity of 6 months from the last date for submission of RFP as specified in the Request for Proposal Document (or such period of validity as may be extended).
- b. If the Bidder, for the period of the Bid Validity (of 6 months)
 - i. in IAIs opinion, commits a material breach of any of the terms and / or conditions contained in the RFP Document and / or subsequent communication from IAI in this regard and / or
 - ii. Fails or refuses to accept the Letter of Award () and/or
 - iii. Fails or refuses to furnish the Performance Guarantee within the stipulated time (viz. 15 days from the issue of the Letter of Award awarding the Design, development, implementation, deployment & maintenance for 2 years of the official website and mobile application of Institute of Actuaries of India to it).

The Guarantee will remain in force up to and including the date of expiry of the period of Bid Validity as stated in the RFP Document or as extended by IAI at any time and notice of which extension to the Bank being hereby waived.

Provided that:

- In the event that Bidder is selected for award of the “Design, development, implementation, deployment & maintenance for 2 years of the official website and mobile application of Institute of Actuaries of India ” through the issue of the Letter of Award, the Bid Security shall remain in force until the creation of the Performance Guarantee by such Bidder OR

- In the event this Bidder is not selected for Award of the “Design, development, implementation, deployment & maintenance for 2 years of the official website and mobile application of Institute of Actuaries of India “, the Bid Security shall remain in force up to and including a period of 30 days after the announcement of Award of “Design, development, implementation, deployment & maintenance for 2 years of the official website and mobile application of Institute of Actuaries of India “ to the Successful Bidder and the issue of the Letter of Award awarding the same. (Provided, however, that in the event that the Bidder is Non Responsive, then the Bid Security of such Bidder can cease to be in force upon return of the unopened Commercial Bid Form).

Any demand in respect this Guarantee should reach the Bank not later than the date of expiry (as defined above) of this Guarantee.

SIGNATURE OF AUTHORISED SIGNATORY OF THE BANK : _____
NAME AND DESIGNATION : _____
SEAL OF THE BANK : _____
TELE NO./FAX NO./EMAIL : _____
SIGNATURE OF THE WITNESS : _____
NAME OF THE WITNESS : _____
ADDRESS OF THE WITNESS : _____

EXHIBIT-4: DESCRIPTION OF THE BIDDING ENTITY / BIDDING CONSORTIUM

Name of the Bidding Entity / Bidding Consortium	
Name of the Lead Member of Bidding Consortium (In Case of a Bidding Consortium)	

In Case of a Bidding Consortium:

S.No	Name of each Consortium Member	Proposed % of Equity “	Role as per the MoU signed by and between/among all the Consortium Members

EXHIBIT-5: PRINCIPLES OF THE MEMORANDUM OF UNDERSTANDING

1. The principles based on which the Memorandum of Understanding (MoU) shall be executed between / among the Members, are stated below:
2. The MoU should clearly specify the roles and responsibilities of each of the Members. It is expected that the individual members have role definitions not conflicting with that of the other members of the consortium. The operational responsibility should be assigned to only one of the Members.
3. The MoU should clearly designate one of the Members as the Lead Member.
4. The Lead Member shall be responsible for tying up the complete financing required for the development of website and mobile application for IAI.
5. Notwithstanding the role of the Lead Member of Consortium, both Members of the Bidding Consortium shall be jointly and severally liable for the execution of Design, Development, Implementation, Deployment & Maintenance of Website and mobile application for IAI
6. The Lead Member should be authorized to perform all tasks including, but not limited to providing information, responding to enquiries, entering into contractual commitments on behalf of the Bidders, etc. in respect of the Design, Development, Implementation, Deployment & Maintenance of Website and mobile application for IAI
7. The MoU should be duly signed by each of the Members.
8. The MoU should be executed on an appropriate stamp paper.
9. The MoU should be specific to the this tender
10. The MoU should be valid for a Minimum of 66 months from the last date for submission of the Request for Proposal. The validity period of the MoU should be extendible on the original terms, if required by IAI.

EXHIBIT-6: TECHNICAL PROPOSAL FORMAT FOR INFORMATION SUBMISSION

1.1.1 PARTICULARS OF THE BIDDER & TECHNICAL EXPERIENCE

Bidders should furnish and attach the substantiating documents as asked for.

The technical proposal of the bidders should contain the following minimum information. Bidders are free to provide, any other information that they deem fit and relevant in support of their bid.

1. Company/Firm Name
2. Company's/ Firm Experience

3. Contact Person's Name with Mobile No. & E-mail
4. Contact details
 - a. Address
 - b. Email
 - c. Phone Number
 - d. Fax
5. List of Offices across India
6. Establishment Details
 - i. Year Established
 - ii. Type of Organization (Educational & Research Institution/Consulting Organization/Any Other (give details)
 - iii. Regd. No. Name and Place of Registering Authority (Attach attested photocopy of Registration Certificate)
 - iv. No. of full time employees (Professional, Support Staff)
7. Certification details
8. Association details
9. Relevant field of Expertise (may be more than one)
10. Last five year's turnover.
11. Is black listed by any Government OR Private firm?
12. Active order book value from Indian customers.
13. Current relevant clientele profile (preferably govt/autonomous/statutory bodies).
14. One page summary mentioning the value add, which may be provided by the firm.

15. Key activities undertaken by the Organization in the past 3 (three) years.
(In brief, extra-sheet may be used if activities are more than 5 in number)

S.NO.	Type of activity (technical consultancy/ research/ study)	Name and Address of Client	Duration (From - To)	Cost (Rs. Lakhs)	Location

Attach a copy of original written work produced by the organization as a proof of its course competence relevant to the proposed assignment.

Bidders are required to provide documentary evidence of their experience duly attested by the concerned entity. In the absence of such proof, IAI reserves the right not to consider the information provided by the Bidders for evaluation.

1.1.2 PRESENTATION OF TECHNICAL PROPOSAL

A presentation on the Technical Proposal may be called for and the bidder may be required to give such clarification and additional information on the Capabilities and Technical Proposal as may be required.

1.1.3 FINANCIAL CAPABILITY

***Financial Statements mean Balance Sheets and Profit and Loss Statements alongwith Note to Statements, duly certified by Chartered Accountant. The audited financial statements etc., are for the years 2013-14, 2014-15, 2015-16.**

1.1.4 FORMAT FOR PROVIDING FINANCIAL CAPABILITY INFORMATION

In addition, the bidders should provide the information in the format asked for in Table-3

TABLE-3

S.No	Name of Consortium Member	Percentage Shareholding	Nature of Entity	Tangible Worth of Entity	Net of the

(The above information should be supported by the audited financial statements for the year 2015-16, certified by CA Firm)

I, Shri (Proprietor / Partner / Director / Attorney Holder of the Firm / Company undertakes and declares that above furnished Information is correct and abides by the Terms & Conditions of the Bid (RFP) Document.

For and on behalf of :

Signature :

Name:

Designation with Seal :

Authorized Representative and Signatory of the Bidding Company or Lead Member of Consortium:

Lead Member :

Name of the Person :

Designation :

Seal :

EXHIBIT-7: FORMAT FOR COMMERCIAL PROPOSAL

Covering Letter (On Bidder's letter head)

Date:

Place:

Executive Director
Institute of Actuaries of India

Sub: Selection of Bidder for "Design, development, implementation, deployment & maintenance (official website and mobile app of Institute of Actuaries of India)"

Dear Sir,

I/ We, _____ (Applicant's name) enclose herewith the Financial Proposal for selection of my / our company for Design, Development, Implementation, deployment & maintenance of IAI Website and mobile application as a Bidder.

I/ We agree that this offer shall remain valid for a period of 90 (Ninety) days from the date of opening of tender or such further period as may be mutually agreed upon.

Yours faithfully,

(Signature, name and designation of the Authorized Signatory)

Note: The Financial Proposal is to be submitted strictly as per forms given in the Tender Document

Financial Proposal

Sub: Selection of Bidder for “Design, development, implementation, deployment & maintenance for 2 years of the official website and mobile application of Institute of Actuaries of India”

S No	Activity	Amount in INR (in figure)	Amount in INR (in words)
1	Design, development, implementation, deployment & maintenance of IAI website (www.actuariesindia.org)		
2	Design, development, implementation, deployment & maintenance of mobile app (www.actuariesindia.org)		
3	Any Other Specific items required to complete the exercise including software license(s) cost involved/ publish on mobile store): 1. 2.		
4	Service Tax/VAT/GST if any		
	Sub Total (A)		
5	AMC charges for maintaining the website and mobile app (3 years)		
6	Service Tax/VAT/GST if any		
	Sub Total (B)		
	Total (C = A+B)		

Note:

1. Total cost shall be quoted as a fixed amount in Indian Rupees only. Conditional proposal shall be summarily rejected.
2. In the event of any discrepancy between the values entered in figures and in words, the values entered in words shall be considered.
3. In the event of arithmetic calculation mistake, the individual price in words shall be considered for calculation.
4. All figures are to be rounded off to the nearest Rupee only. Any figures given in paisa will be not considered.

Authorized Signatory
Name
Designation
Name of the Company
Address